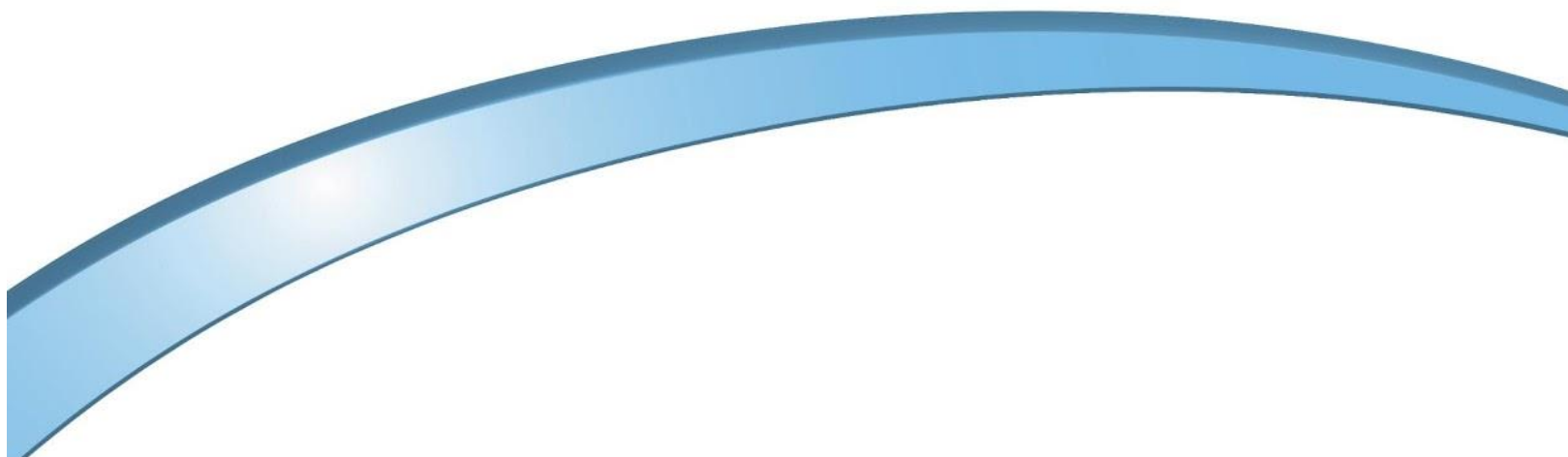


Report-Charts-Dashboards

User Guide



Report-Charts-Dashboards User Guide

© 2001- 2020 All rights reserved. Under copyright laws, this document may not be copied, photocopied, reproduced, or translated without prior consent.

Publish Date – July 2020

Revision Date - Current as of R69 System Release (June 2020)

CONTENTS

Reports – Common Options	7
Preserving Report Data When Navigating Away	7
Manual Column Resizing	7
Automatic Column Resizing	7
Inline Filtering	7
Sorting Report Data	7
Sorting Shortcuts	8
Grouping Report Data	8
Column Settings	9
Adding/Removing Columns	10
View Mode	11
Filters Icon	13
Global Filters Tab - Date Selections	13
Global Filters Tab - Selecting Employees	14
Adding Company Groups to Employee Filter	14
Using the Advanced Filter in Employee Selections	15
Column Filters Tab	17
Custom Filters Tab	17
Saving Views and Exporting Report Data	19
Save View & Save View As	19
Manage Views	20
Export & Export Settings	20
Other Saved Report Options	21
Manage Email Schedules	21
Adding a Schedule	22
Deliver With Payroll	23
My Reports Menu	24
My Saved Reports	24
My Scheduled Reports	24
Scheduling Reports	24
Retrieving and Exporting Saved Reports	24
Report Definitions	25
Team Reports	25
Time Reports	25
Schedule Reports	26
Benefits Reports	26
HR Reports	27
Talent Reports	28
Compensation Reports	28
Payroll Reports	28
Recruitment Reports	30
System Reports	30
Charts	32

About Charts	32
Report View Modes	32
Creating Charts	33
Multiple Categories in Charts	34
Selecting Charts	35
Chart Views	35
Dashboards	38
First Screen Options	38
First Screen Option in Company Setup	38
First Screen Option in Security Profiles	38
First Screen Option in Cost Centers	39
First Screen Option in Employee Information	39
First Screen Option in Mass Edit	39
New UI Dashboard Layout Profile	40
Home (Landing Page) Dashboard	40
Employee Banner	40
Configuring New UI Dashboard Layout Profiles	42
Start Screen in the Mobile Application	43
Hamburger Menu Settings	43
Schedule	43
Adding Widgets in the New Dashboard Layout Configuration	44
Adding Default Widgets to the New UI Dashboard Layout Configuration	44
Adding Widgets to My Landing Dashboard	45
Available Widgets	46
New Dashboard Tiles for Widgets	48
Adding Reports/Charts in the New Dashboard Layout Configuration	48
Modifying the New Dashboard Layout Configuration	48
Custom and Domain Tabs	49
Save and Reset Windows	49
Reset Windows Widget Configurations	50
Assigning New UI Dashboard Layout Profiles	50
Assigning Profiles	50
Updating the New UI Dashboard Layout Assignment	50
Security Permissions	51
Security Profile Settings	51
Allowed Widget Permissions	51
Migrated Allowed Widgets Permissions for New Widgets	52
Using Charts in Dashboards	53
My Dashboard & Domain Dashboards	53
About My Dashboards	53
About Domain Dashboards	53
Adding Charts to Dashboards	54
Dashboard Options	55
Showing Chart Tiles as Reports on Dashboard Tiles	56
Report/Chart Tiles Maximum on a Dashboard	56
Adding Charts from Reports to the Dashboard	57

Printing Charts from the New UI Dashboard Layout	57
Dashboard Views	58
Sharing Dashboards	58
Adjusting Width and Height of Dashboard Tiles	59
Adjust Tile Width	59
Adjust Row Height	59
Addendum	60
Charts for Succession Planning	60
Succession Charts Tooltips	60
Metric History Graph	60
Metric Bar Chart	60
Metric Pie Chart	61
Talent Matrix Chart	61
Importing Dashboard Content	62

Reports – Common Options

The system offers extensive reporting options and capabilities for you to gather and present data in a variety of ways. You may save favorite report settings, schedule reports to run at specific times, and export reports. The system has two types of reports.

- Many are listed under *Reports* menus in the *Team* menu and those under the *My Reports* menu in the *My Info* menu.
- Most of the maintenance pages in the system are also referred to as reports and contain many of the standard report features.

The options in reports are available across all reports and are presented here to help you familiarize yourself with the navigation and use of these options.

Preserving Report Data When Navigating Away

When report views have been modified but not yet saved, they are preserved when users click on report-based buttons/links and then navigate back to the report view. Changes such as sorting, grouping, and filtering are preserved.

When you click on a page level or row level action in a report, the options set in the unsaved view of the report such as added/removed columns, sorted columns, updated grouping, etc. are preserved. The unsaved view may not be preserved if you navigate away from the report using the main menu, using another tab, or if accessing something other than what is available in the report page, such as employee quick links.

Manual Column Resizing

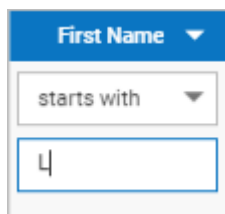
To manually expand a column, hover over the dividing line between columns until the double arrow displays and then click and drag the column to the desired width.

Automatic Column Resizing

The column widths will dynamically adjust to the screen size and available space. Extra-long links will wrap if they exceed the available space. If the report page contains columns and actions ellipses, the actions will always display.

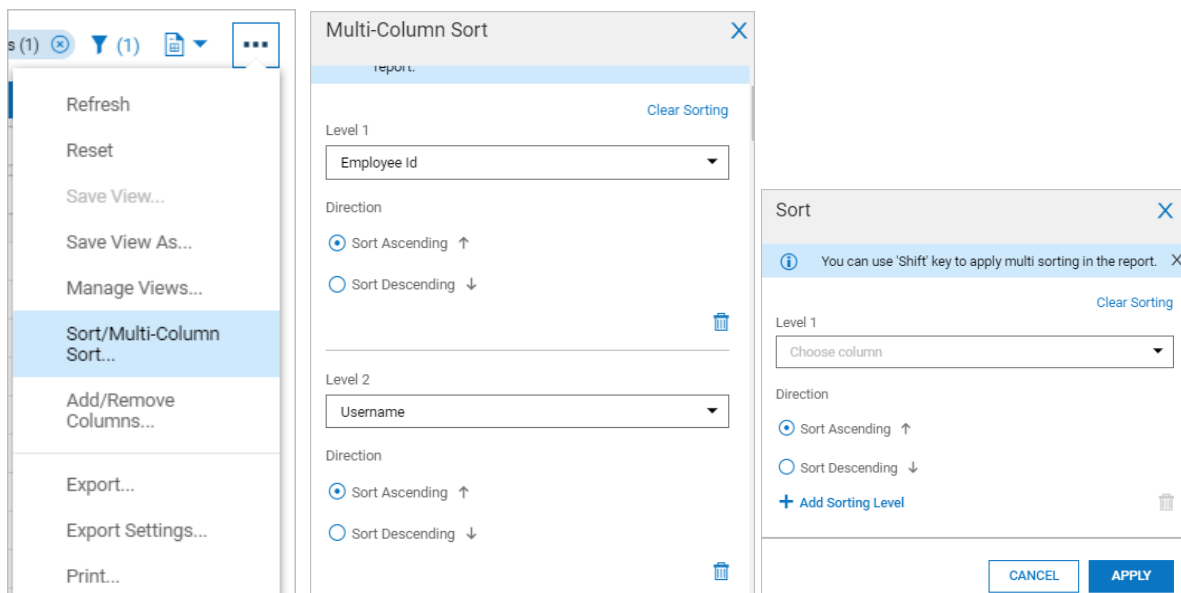
Inline Filtering

Report pages have filtering options known as inline filtering across each column on the page. Each column can be filtered with operators (=, !=, starts with, not starts, like, not like, in, not in, is null, is not null, between, no between) and then a value placed in the field below the operator. Multiple columns can be set with filtering criteria.

A screenshot of an inline filtering interface. At the top, there is a blue header bar with the text "First Name" and a downward-pointing arrow. Below this, there is a white box containing a dropdown menu with the text "starts with" and a downward-pointing arrow. Below the dropdown menu, there is a text input field containing the letter "L".

Sorting Report Data

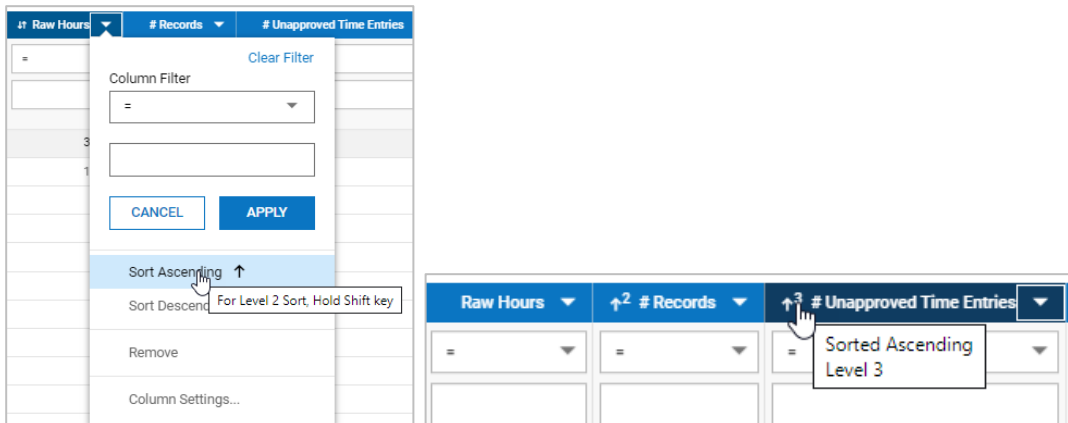
When viewing the report page, the data can be sorted by activating the items under the *Ellipses* icon and selecting *Sort/Multi-Column Sort*. Select the column and sort order to define how the data will be sorted. If one or more levels of sorting is needed, select *Add Sorting Level*. The page will change from *Sort* to *Multi-Column Sort*. If a level is not needed, use the trash icon to remove it. To reset all sorting options, select the *Clear Sorting* link. Select *Apply* to enact the sorting criteria.



Sorting Shortcuts

If using a desktop computer rather than a mobile device, multi-column sort is activated in a report on a Windows computer by pressing and holding either the Shift or Ctrl Key and clicking the sorting arrow for two or more columns to produce either an ascending or descending sort direction. On an Apple Mac computer this can be performed by pressing and holding the ⌘ Command key and clicking the sorting arrow for the desired sort direction.

Clicking a column to apply filtering criteria, you will find tool tips when hovering over the *Sort Ascending* and *Sort Descending* text. The tool tip states you can hold the Shift key, click the option and activate the next level sort. You can do this for multiple columns. In the report header, you will see the numbered columns indicating the sorting selections. You can hover over the number to see the applied sorting criteria.



Columns can also be sorted by placing your cursor in the column heading until the double arrows display. Clicking the arrows will change or toggle the column in ascending or descending order.



Grouping Report Data

Other options are available to *Group* by the filtering criteria. Once grouped, the *Grouped By* column will display. The drop-down in this column will show the column used to perform the grouping. Unchecking the column and clicking *Apply* will ungroup the column. If employees are included in the *Grouped By* column, an ellipses will display and when selected will display links to *Employee Information* and *Employee Quick Links*.

Column Filter

starts with

L

CANCEL APPLY

Sort Ascending ↑

Sort Descending ↓

Remove

Group

Column Settings...

Grouped By

In Payroll

GROUP 1

☒ Employee

APPLY

Employee 55, Icook, Laura, Cook

Employee 17, Iberkman, Lance, Berkman

Employee 7900, Iisa.brown, Lisa, Brown

Yes

Yes

Employee 17, Iberkman, Lance, Berkman

Account Field 2

Employee Information

Employee Quick Links

Further sorting, filtering, and column settings can be applied to each line in the grouped column by clicking the down-arrow for the field.

Grouped By

In Payroll

Account Field 2

Employee 55, Icook, Laura, Cook

Account Field 2

Employee 17, Iberkman, Lance, Berkman

Account Field 2

Employee 7900, Iisa.brown, Lisa, Brown

Account Field 2

Employee 7900, Iisa.brown, Lisa, Brown

Account Field 2

Account Field 2

Sort Ascending ↑

Sort Descending ↓

Filter Column

Ungroup

Column Settings...

Column Settings

Also within the column pop-up are *Column Settings*, which allows you to set a column width (100-700 pixels), set the alignment of column contents (system default, left, center, or right) and set a custom label.

Column Settings

Width (pixels)

250

Alignment

☐ System Default

☐ Left

☒ Center

☐ Right

Custom Label for 'First Name'

CANCEL APPLY

First Name

starts with

L

Laura

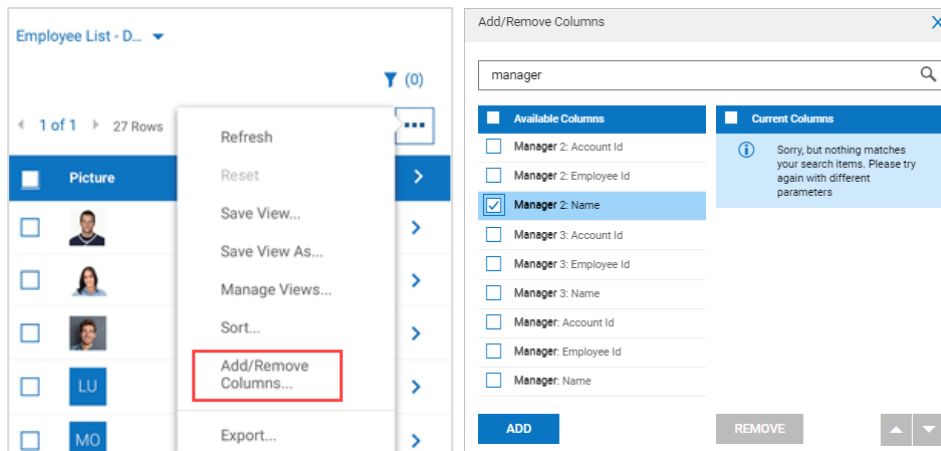
Lance

Lisa

Lisa

Adding/Removing Columns

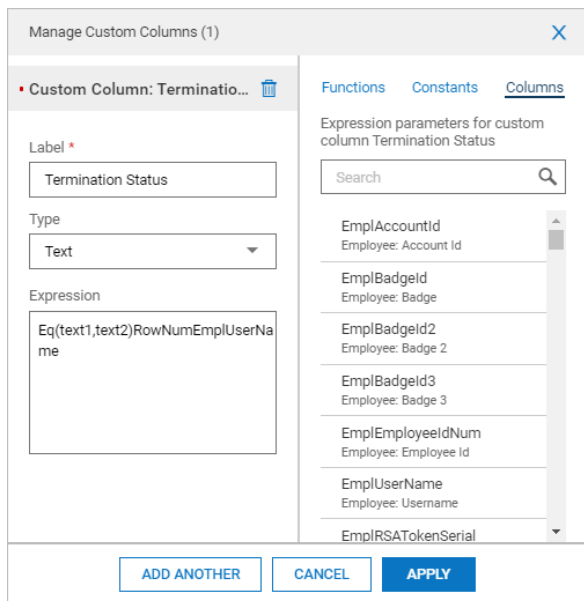
You can add, reorder or remove columns in reports to see the information that is most relevant to you. From the actions ellipses in a report, select *Add/Remove Columns*. Click on the appropriate icons to add a column or remove a column. To quickly find a column to add, you can enter a few characters in the *Search* field. Use the arrows to change the order of selected columns in the report.



Custom columns can be created and added to the report by selecting *Manage Custom Columns* from the *Add/Remove Columns* pop-up. You can enter the column name and field type, and create expressions using functions, constants and columns. The *Type* will determine the type of data for the column. Options are Text, Numeric, Monday, Date and Time.

On each tab, you can select the pieces that you will need to build the final expression. Functions are operations that produce the value shown in the report, using constant values (on the *Constants* tab) or data fields pulled from the system (on the *Columns* tab).

Clicking the *Apply* button will add the item to your expressions box where the final expression can be edited



For example, to add a column that returns True or False to indicate if an employee is terminated or not, you would create this expression: `Eq(EmplStatusName, "Terminated")`. From the *Functions* tab, you would find and add this function to the expression box by tapping the *Apply* button. From the *Columns* tab, you would find the name of the data field that represented the employee status, select it and tap the *Apply* button to save the column. Both items are

added to the *Expression* box on the *Manage Custom Columns* pop-up, but they are added in the order in which they were selected from the tabs. To complete the expression, you'll need to edit the text in the *Expression* box.

The column will appear in the list of columns on the *Add/Remove Columns* pop-up. After the label and expression are completed, select *Apply* to add the custom column to the report.

View Mode

Under the paper icon you have the options of viewing reports as *Data Only*, *Charts Only*, or *Charts & Data*. For more information on charts, please see the *Report Charts* section.

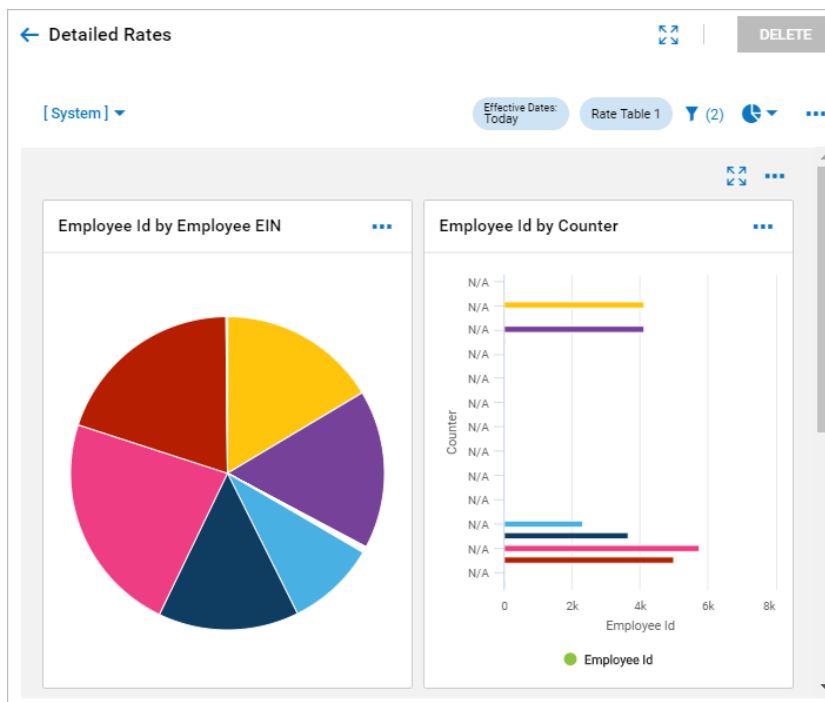
The *Data Only* is default option and will display reports in a traditional report view.

← Detailed Rates DELETED

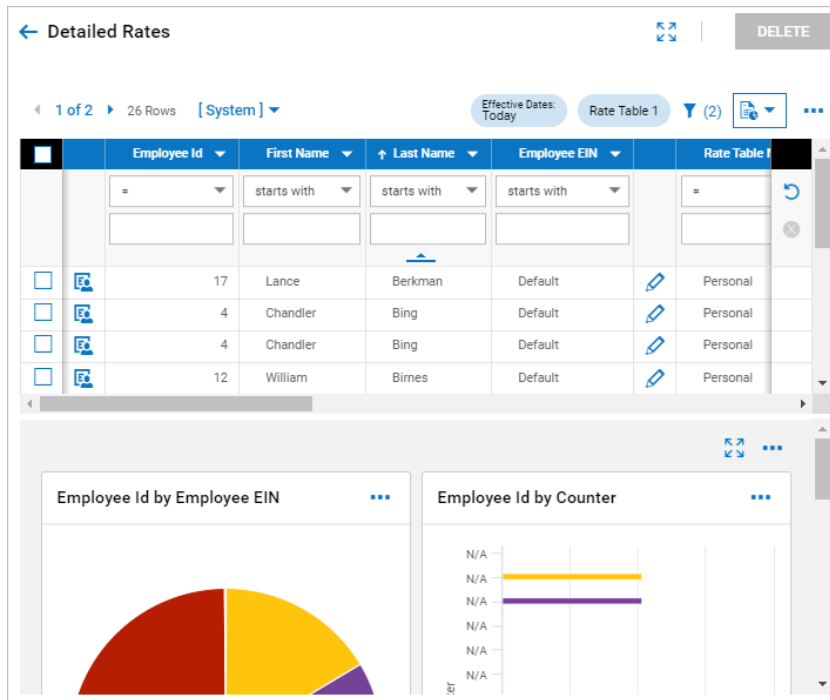
1 of 2 26 Rows [System] Effective Dates: Today Rate Table 1 (2) [Filter] [More]

	Employee Id	First Name	Last Name	Employee EIN	Rate Table
	=	starts with	starts with	starts with	=
<input type="checkbox"/>	17	Lance	Berkman	Default	Personal
<input type="checkbox"/>	4	Chandler	Bing	Default	Personal
<input type="checkbox"/>	4	Chandler	Bing	Default	Personal
<input type="checkbox"/>	12	William	Bimes	Default	Personal
<input type="checkbox"/>	6	Phoebe	Buffet	Default	Personal
<input type="checkbox"/>	4125	Steven	Buren	Default	Personal
<input type="checkbox"/>	4125	Steven	Buren	Default	Personal
<input type="checkbox"/>	13	Chris	Carpenter	Default	Personal
<input type="checkbox"/>	9	Sheldon	Cooper	Default	Personal
<input type="checkbox"/>	11	Darryl	Dixon	Default	Personal
<input type="checkbox"/>	2323	Steven	Fast	Default	Personal
<input type="checkbox"/>	5002	Terry	Finley	Default	Personal
<input type="checkbox"/>	18	David	Freese	Default	Personal

The *Charts Only* is an option to view the report in a graphical view. The icon will change when changing your view and will indicate which type of view is shown.



The *Charts & Data* option will display both the traditional reports at the top of the screen with the charts underneath.



Filters Icon

If you would rather not use inline filtering over the columns, the filter funnel icon contains multiple filtering options. Options available for filtering are *Global* and *Column*, and in some reports a *Custom* tab is available.

Effective Dates: Today | Rate Table 1 | (2) | [Filter Icon] | ...

Filters

Global | Column | Custom

Employee Filter

All Employees

Global Filters Tab - Date Selections

The time period and date range for the report can be selected from the drop-downs for *Type* and *Date Range*. Selecting *Apply* will update the report according to the selections.

Filters

Global | Column

Date Created

Type

Calendar Range

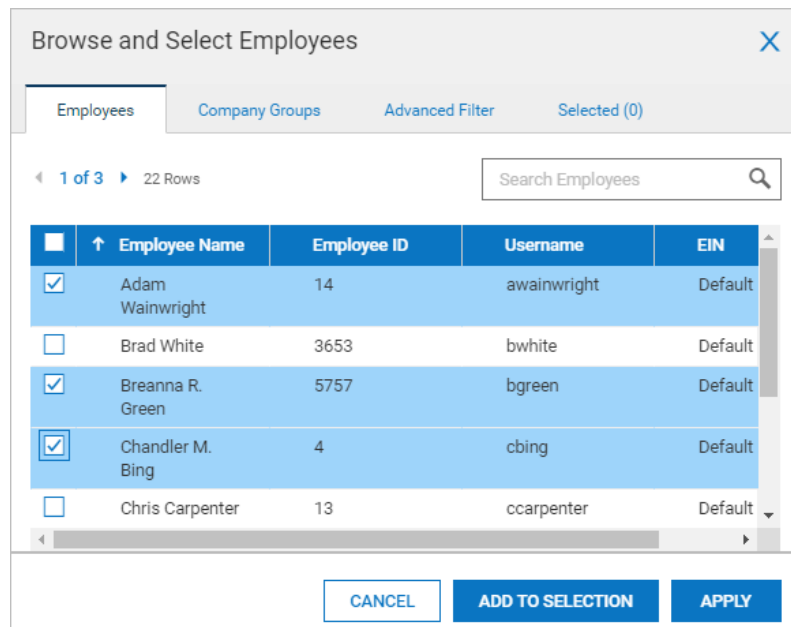
Date Range

Today

Selected range: Feb 28, 2020

Global Filters Tab - Selecting Employees

You can select employees to be included in certain reports under the *Global* column of the filter. From the *Employee Filter* drop-down, select *Browse*. The *Browse and Select Employees* pop-up will display, where you can make employee selection by the employee or group. Advanced filtering on this pop-up is also available.



Browse and Select Employees

Employees Company Groups Advanced Filter Selected (0)

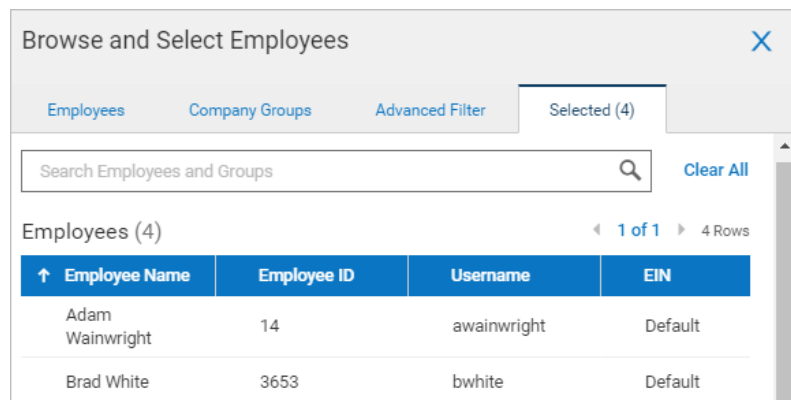
1 of 3 22 Rows Search Employees

	Employee Name	Employee ID	Username	EIN
<input checked="" type="checkbox"/>	Adam Wainwright	14	awainwright	Default
<input type="checkbox"/>	Brad White	3653	bwhite	Default
<input checked="" type="checkbox"/>	Breanna R. Green	5757	bgreen	Default
<input checked="" type="checkbox"/>	Chandler M. Bing	4	cbing	Default
<input type="checkbox"/>	Chris Carpenter	13	ccarpenter	Default

CANCEL ADD TO SELECTION APPLY

All the employees to which you have access will display in this list. A *Search Employees* field is available to find employees. Check each employee to be included.

Once the employees are selected, you can select *Apply* to make the selections immediate, or if you plan to add/remove or just wish to review your selections, select *Add To Selection*. When selecting this option, the *Selected* tab will update and show the number of selected employees. Click the tab to review your selections. On this tab you can search for employees and groups added to the filter. The *Clear All* option will remove all the selections from the page.



Browse and Select Employees

Employees Company Groups Advanced Filter Selected (4)

Search Employees and Groups Clear All

Employees (4) 1 of 1 4 Rows

Employee Name	Employee ID	Username	EIN
Adam Wainwright	14	awainwright	Default
Brad White	3653	bwhite	Default

Adding Company Groups to Employee Filter

From the *Company Groups* tab you can select employees by the group to which they are assigned. If your group list is large, you can use the *Group Type* and *Search* window to narrow the list.

As with employee selections, you can select *Apply* to immediately apply the selections, or you can use the *Add To Selection* option and the group selections will be added to the filter and placed under the *Selected* tab.

Browse and Select Employees ✕

Employees Company Groups Advanced Filter Selected (4)

1 of 2 19 Rows Group Type Choose... Search Groups

	Type	Name	# Of Members	Description
<input type="checkbox"/>	Filter Based	EverythingBenefits	29	Built-in company used by EverythingBenefits Marl product.
<input type="checkbox"/>	Manager	Monica Gellar	22	Manager

Browse and Select Employees ✕

Employees Company Groups Advanced Filter Selected (4)

Breanna R. Green	5757	bgreen	Default
Chandler M. Bing	4	cbing	Default
Chris Carpenter	13	ccarpenter	Default

Company Groups (1) 1 of 1 1 Rows [Expand All To Employee List](#)

Type	Name	# Of Members	Description
Manager	Chris Carpenter	2	Manager

CANCEL APPLY

If a group has been added to the filter, you can convert the group to an individual employee list using the *Expand All To Employee List* link. You will be prompted with a confirmation informing you that all groups in the filter will be expanded and converted to an employee list and that future group additions will not be included in the expansion.

Using the Advanced Filter in Employee Selections

In some cases, you may want to select employees based on targeted information. Under the *Advanced Filter* tab, you can define this targeted information. The criteria is based on selected operators and parameters and can be as simple as one selection, or multi-layered conditions. Options are available to add, move and delete the filter as it's being built. The *Clear Filter* option will remove everything on the page so you can start over.

When your filter is built, be sure to select *Apply*.

Advanced Filter

AND

ACA Status

...

AND

Select Parameter

...

+ Add

+ Add

Clear Filter

Move Up

Move Down

Delete

Summary

(AND (Undefined condition))

CANCEL

APPLY

After the advanced filter is built and applied, it will be summarized. To view or edit the filter, select the edit icon. Or to delete it, select the trash icon.

Browse and Select Employees

Employees

Company Groups

Advanced Filter

Selected (0)

AND(, AND(, NOT()))

(AND (AND (NOT)))

Advanced filter will be added to the *Selected* tab, along with any other selections. As with company groups, the employees included in the advanced filter can be expanded to show those employees. A warning/confirmation will display. When all selection are ready, select *Apply* to update the report page.

Browse and Select Employees

Employees

Company Groups

Advanced Filter

Selected (7)

Search Employees and Groups

Clear All

Employees (4)

Page 1 of 1

1 - 4 of 4 Rows

Employee Name	Employee ID	Username	EIN	Actions
Adam Wainwright	14	awainwright	Default	
Brad White	3653	bwhite	Default	
Breanna R. Green	5757	bgreen	Default	
Chandler M. Bing	4	cbing	Default	

Company Groups (1)

Page 1 of 1

1 - 1 of 1 Rows

Expand All To Employee List

Type	Name	# Of Members	Description	Actions
Position Based - Direct Reporting	Engineering Support	6	Position Based - Direct Reporting	

Advanced Filter

Expand To Employee List

AND(,)

CANCEL

APPLY

Column Filters Tab

Filters restrict the type of data that is returned based on column values. Different types of filters are available for different types of reports. Column filter selections will not be saved after exiting the report or logging off. If you want to save the filter selections, use the *Save View As* option under the actions ellipses. The report view will then be available for later use and can be accessed under *My Info > My Reports > My Saved Reports*.

The same options available in inline filtering above the columns are available here. Filters can be cleared by selecting the *Clear Filters* link.

The screenshot shows a 'Filters' dialog box with a close button (X) in the top right corner. It has three tabs: 'Global', 'Column' (which is selected), and 'Custom'. A 'Clear Filters' link is located at the top right of the filter list. The filter list contains the following items:

- Employee Id: Operator '=', Value field empty.
- Badge: Operator '=', Value field empty.
- Username: Operator 'starts with', Value field empty.
- First Name: Operator 'starts with', Value field empty.
- Last Name: Operator 'starts with', Value 'B'.
- Employee EIN: Operator 'starts with', Value field empty.
- In Payroll: Operator 'Yes', Value field empty.
- Locked: Operator 'All', Value field empty.
- ID Cards: Operator '=', Value field empty.

At the bottom of the dialog are two buttons: 'CANCEL' and 'APPLY'.


Custom Filters Tab

Customized filters can be created and work very similar to the advanced filters in the employee selection filter. You can add column criteria based on Condition or Operator. Each item has an ellipsis with options for move the entry up or down or delete it. Selecting the *Clear Filter* link will remove everything from the page so you can start over.

After clicking *Apply*, the custom column will be summarized under the *Custom* tab. Here, it can be viewed or edited by selecting the edit icon or delete it by uses the trash icon. To remove the custom filter, use the on/off slider on the *Custom* tab.

Custom Filter

AND


Employee: Locale (Langu. 

=

English

...

AND

Employee: Locale (Langu. 

=

French

...

AND

+ Add

+ Add

+ Add

Clear Filter

Summary

(Employee: Locale (Language & Formats) = English AND (Employee: Locale (Language & Formats) = French AND ()))

CANCEL

APPLY

Filters


Global


Column

Custom

☒

Custom Filter





(Employee: Locale (Language & Formats) = English AND (NOT Employee: Locale (Language & Formats) = French))

CANCEL

APPLY


When the filter are applied to the report page, each column will display in a different color shade and will show the filter icon in the column heading.

- The filter funnel icon will display the amount of filtering criteria in use.
- If a custom filter is in place, the *Custom Filter* pill will display on the report page and indicate if the filter is active or inactive. You can click the slider in the pill to turn the custom filter on/off.
- The *Columns* pill will show how many columns are being filtered. Clicking/opening will show you the filtering in use and allow you to make changes.

Columns (3)

Custom Filter ☒

(4)

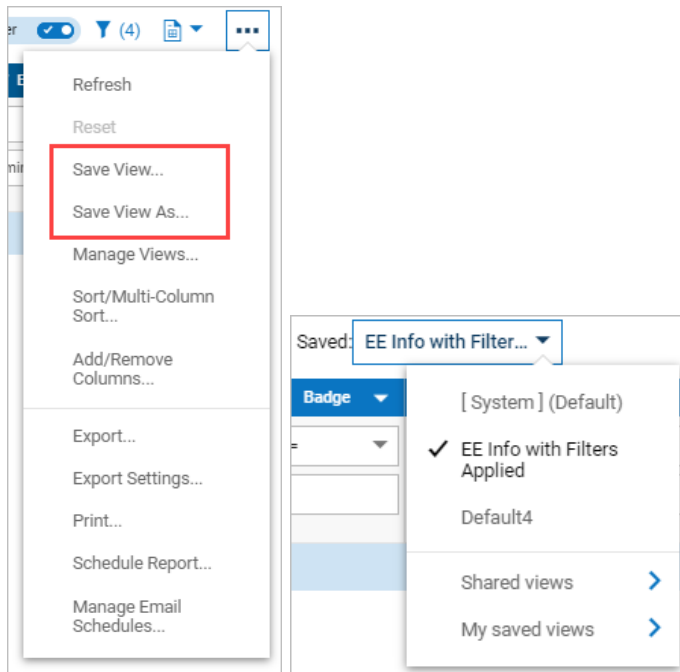


...

La...	Empl...	In ...	Locked	ID Car...	Prefer...	Natio...	Em...	Extern...
starts with	starts with	Yes	All	=	=	=	!=	=
B							Terminated	

Saving Views and Exporting Report Data

When you have applied filters and sorting criteria to get your report just right, and you don't want to lose those options when you log out or move to another area of the application, you can save your report for later use. If you want to use your report in a different format, you can also export it using a variety of export formats.



Save View & Save View As

Under the actions ellipses, the *Save View* and *Save View As* options are available. When saving a view, you must provide a name and can optionally add a description and tag. You can make the view the default, disable deletion of the view and share the view with other employees. If sharing the report view, you can select all employees in your company, or you can select specific employees and groups by using the employee selection filter. The number of selected employees will display in the share field.

- *Save View* will save the current report view and this option can be used any time you need to make adjustments to the report view.
- *Save View As* will save the current report view and you must give the report a different name from the original.

Once the view is saved, you can access your saved views under *My Info > My Reports > My Saved Reports*, or in the report itself, if there are saved views, a *Saved* option will display above the columns. Select the drop-down to select your desired view. You can select the report default view, any of your saved views and views shared by others.

Save View

Name *

EE Info with Filters Applied

Description

Employee Information Report Page with multiple filters applied.
Shows only employees with last name starting with B, status not terminated.

Tag

EE INFO

☒ Deletion Is Not Allowed
 ☒ My Default

☒ Share

☒ Share With Others

Employees (28)

☐ Share With All

CANCEL

SAVE

SAVE & RUN

Manage Views

The *Manage Views* option enables users to *Run* or *Delete* an existing view. The *Edit* option under *Manage Views* allows you to change the view settings, such as name or sharing.

Manage Views

Show: All

Report View	Description	Owner	Date Created	Default	Actions
[System]		System		<input type="radio"/>	...
Default4		System Administrator	April 8, 2014	<input type="radio"/>	...
EE Info with Filters Applied	Employee Information Report Page with multiple filters applied. Shows only employees with last name starting with B, status not terminated.	My	February 28, 2020	<input checked="" type="radio"/>	... <div> Run Edit </div>

Export & Export Settings

The *Export* option allows you to export your report in a variety of formats, including CSV, Excel, PDF, HTML, XML and Text. You can opt to include the header/footer of the report in the exported file, or export in Unicode. The pop-up for exporting contains a link to *Export Settings*. Using this link prevents you from having to cancel and select *Export Settings* in the actions menu and then re-select *Export* again.

Export settings include options for the report layout, margins, font size, page break, header and footer display, column name display, how to handle dashes and totals display. All columns are included in the export file by default, but the columns can be limited in the export settings under the *Columns To Export* tab. Under that tab, you can even add custom labels to the columns and limit the characters for each column.

Export

Export File As

PDF

☒ Display Header/Footer
 ☐ Use Unicode

CANCEL

EXPORT

Export Settings

Advanced Settings

Columns To Export

Layout

Landscape

Display Header/Footer

Display Column Names

Margins

Top

Right

Bottom

Left

Font Size

7

Page Break

No Page Break

Export Dash As

Default

Empty

Custom

Display Totals

Export Settings

Advanced Settings

Columns To Export

Search

<input checked="" type="checkbox"/>	Columns In Report	Custom Label	Characters Limit
<input checked="" type="checkbox"/>	Employee Id		
<input checked="" type="checkbox"/>	Badge		
<input checked="" type="checkbox"/>	Username		
<input checked="" type="checkbox"/>	First Name		
<input checked="" type="checkbox"/>	Last Name		

Other Saved Report Options

For saved reports, other options are available that will allow you to manage schedules for emailed reports, and to deliver the report with payroll. These options are only available within saved reports that have been run. These options are only available for authorized users.

Manage Email Schedules

This option allows you to add an email schedule to a report using the *Add Schedule* link. In it, you will set the schedule, recipients, and message. Once the schedule is set, options are available to *Edit*, *Email Now* and *Delete* the schedules. The *Manage Email Schedules* option is disabled for system reports.

Manage Email Schedules

Search Email Schedule...

+ Add Schedule

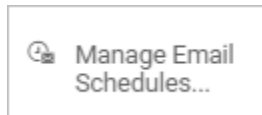
↑ Email Schedule	Description	Enabled	Date Created	Actions
EE Info with Filters		Yes	Feb 28, 2020	<div>...</div> <div> <div>Edit</div> <div>Email Now</div> <div>Delete</div> </div>

Adding a Schedule

You can enter/edit the following fields in the *Schedule* section:

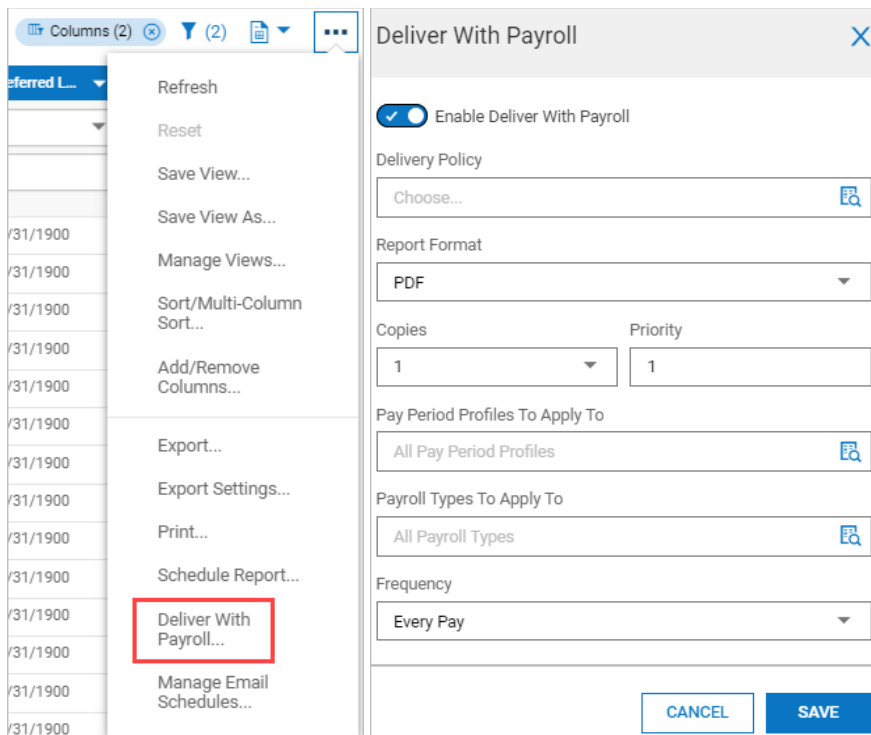
- **Schedule Type** - In the *Schedule* section for the required *Schedule Type* field, you can choose *Weekdays* or a *Days Profile*.
 - For *Weekdays*, select the days of the week.
 - When setting an email schedule for a saved report, the first day of the week and subsequent pattern in the *Schedule* section will be based on the *First Weekday* setting in *Company Setup*.
 - For *Days Profile*, select a profile in the *Days in Days Profile* field. The text in the field label is linked to the data in *Company Settings > Profiles/Policies > Days* where edits can be made, or a new profile created and used.
 - A Tooltip in the *Days In Days Profile* field displays the rules configured in the selected profile.
 - When using a Days Profile, the language/locale specified for the user's employee account will display in the Tooltip.
 - If the field is empty, the Tooltip will be grayed out.
 - If no rules are set in the selected Days Profile, a message will display indicating no rules are configured for the profile.
- **Schedule** - The user can input the desired time in the required *Schedule* field.
- **Recipients** – Select to send the report to yourself, or select a specific account, group or email address (multiple email addresses can be added by clicking *Add*. Select the permissions for the recipient; you can choose your own, or theirs. If the schedule owner's permissions are used, do not include sensitive data in the report view.
- **Email** – Set a report format (PDF, Excel, etc.) and optional password. Fill out and format the email and message body. A maximum of 3,500 report rows can be included in the report, but the number of rows can be specified if fewer than 3,500 rows are required.

After adding an email schedule to a saved report, if there are one or more schedules assigned, an email schedule icon will display next to the *Manage Email Schedules* option. When this icon is present, users will know that an email schedule exists.



Deliver With Payroll

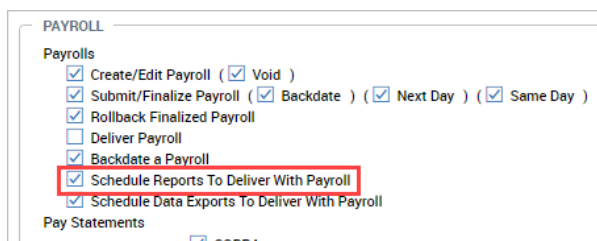
Report deliveries can be automated for saved report views. To enable delivery, run the saved report, and select the *Deliver with Payroll* option. Select a delivery policy, format, copies/priorities, pay periods, payroll types and frequency.



For the *Deliver With Payroll* and/or *Schedule This Report* option(s), when users update the view of a report from a personal setting to one visible by others, a warning message is displayed.

The warning states: *You will lose existing configuration of Deliver with Payroll Schedule upon making the view company wide. You will lose existing configuration of Schedule upon sharing this view.*

Users must have the *Schedule Reports To Deliver With Payroll* permission enabled in their security profiles.



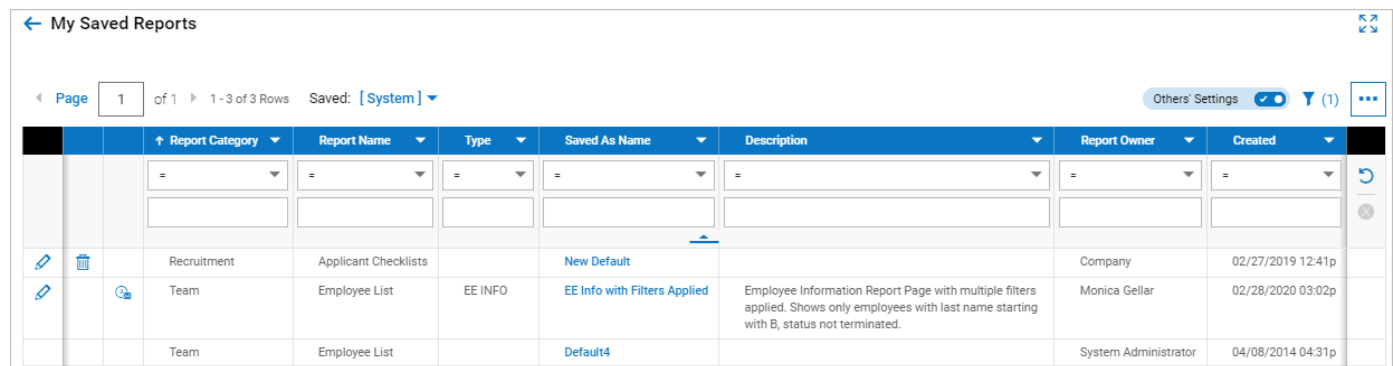
My Reports Menu

The menu items discussed in this section are based on a full suite product environment (TLM, HR, Payroll, Scheduler) and some additional functionality such as Attestation, Position Management, Recruitment, Compensation Management and more.

My Saved Reports

After saving reports, the My Saved Reports page will show all the reports you saved. Each report will have an edit icon for editing the settings on the report. A trash icon is available to delete a report (if deletion is allowed), and if you have managed email schedules or set up a report to be delivered with payroll, icons will display for those options and are clickable so you can view and edit settings.

If other users have shared their saved reports with you, the *Others' Settings* toggle will be available for you to turn off/on those reports.



		Report Category	Report Name	Type	Saved As Name	Description	Report Owner	Created
		Recruitment	Applicant Checklists		New Default		Company	02/27/2019 12:41p
		Team	Employee List	EE INFO	EE Info with Filters Applied	Employee Information Report Page with multiple filters applied. Shows only employees with last name starting with B, status not terminated.	Monica Gellar	02/28/2020 03:02p
		Team	Employee List		Default4		System Administrator	04/08/2014 04:31p

My Scheduled Reports

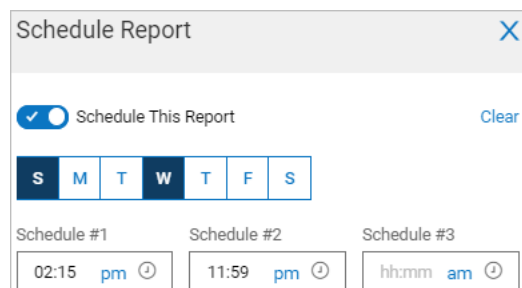
Reports that have been scheduled and have run can be accessed under *My Info > My Reports > My Scheduled Reports* and then exported in various formats. This also assumes a user with permission to all reports listed under the *Reports* tab of security profiles.

Scheduling Reports

Most reports in the system can be scheduled. In the actions ellipses, you will see the *Schedule Report* option and it will be grayed out, meaning it cannot be selected. To activate this option, you must save the report using the *Save View As* option. System default reports cannot be scheduled. To schedule a report, you must make a personal copy of the report.

Once a report is saved, select that report so it is the current view. This can be done from the *Saved* drop-down above the columns.

Select the *Schedule Report* option. Activate the *Schedule This Report* slider and set the days for the report to run. Up to three schedules can be set. The *Clear* link will remove the set times in all three fields.



Schedule Report

☒ Schedule This Report [Clear](#)

S M T W T F S

Schedule #1 Schedule #2 Schedule #3

02:15 pm 11:59 pm hh:mm am

Retrieving and Exporting Saved Reports

Once the schedule has rolled up and the report is run, the report will appear in the My Scheduled Reports page. From here, you can export the report in your choice of formats (CSV, Excel, PDF, HTML, Text).

Report Definitions

These reports are under *My Info > My Reports*. The reports listed here are for a full suite company (TLM, Scheduler, HR, Payroll) and assumes a user will full access to all reports.

Team Reports

My Info > My Reports > Team Reports

- **Employees Missing Primary Position** – This report requires Position Management to be enabled in the company. It will show any employee missing a Primary Position assignment and their employee status (Active/Terminated/Leave.)
- **Exceptions for Reports-To Position** – This report requires Position Management to be enabled in the company. It shows Positions set with the *Directly Reports To* option and shows if that field is active in the configuration page of that Position.
- **Position Headcount Detail** – This report requires Position Management to be enabled in the company. It shows all Positions, effective dates, assigned totals and other Position details.
- **Position Headcount Summary** – This report requires Position Management to be enabled in the company. This report shows Position information and summarizes totals by assignments, vacancies, budgets and more.
- **Position History** - This report requires Position Management to be enabled in the company. This report is an audit report of Positions and shows the action performed with old/new values, effective from dates and employee ID.

Time Reports

My Info > My Reports > Time Reports > Adjustment Pay

- **Adjustment Pay Summary** –
- **Detailed Adjustment Pay** -

My Info > My Reports > Time Reports > Attestation

- **Daily Attestation Summary** –
- **Questions and Answers** –
- **Timesheet Attestation Summary** -

My Info > My Reports > Time Reports > Audit Trail

- **Attestation Question** –
- **Attestation Workflow** –
- **Employee Schedule Entries** –
- **Extra Pay & Counter Adjustment** –
- **Extra Pay Entries** –
- **Overtime Requests** –
- **Approve Time Entries Access Report** –
- **My To Do Items Access Report** –
- **Time Adjustment Entries** –
- **Time Entries** –
- **Time Off Requests** –
- **Timesheets** -

My Info > My Reports > Time Reports > Calculated Time

- **Annualized Projected Hours –**
- **Average Calculated Time –**
- **Calculated Time Summary –**
- **Calculated Cumulative Counter –**
- **Detailed Calculated Time –**
- **Detailed Corrected Time –**
- **Lunch & Breaks –**
- **Spells Of Absence -**

My Info > My Reports > Time Reports > Extra Pay

- **Detailed Extra Pay –**
- **Extra Pay Summary -**

My Info > My Reports > Time Reports > Overtime

- **Employee Overtime Overview –**
- **Employee Overtime Request Summary -**

My Info > My Reports > Time Reports > Points

- **Detailed Points Report –**
- **Points History Report -**

My Info > My Reports > Time Reports > Time Allocation

- **All Timesheet Documents –**
- **All Timesheet Notes –**
- **Attendance Board –**
- **Detailed Hours –**
- **Exceptions -**
- **Exceptions Summary By Week –**
- **Late/Early/Absent –**
- **Summary Hours –**
- **Time Off Roster –**
- **Time Summary By Week -**

Schedule Reports

My Info > My Reports > Schedule Reports

- **Roll Call -**
- **Scheduled vs Actual Detailed –**
- **Scheduled vs Actual Summary -**

Benefits Reports

My Info > My Reports > Benefits Reports

- **Benefit Census Report –** This report shows, by employee and EIN, the benefits assigned to each employee. This report also shows demographic and other information from employee accounts.

- **Benefit New Hire Status** – This report shows all new hires and their enrollment status for benefits.
- **Benefit Open Enrollment Status** – This report shows employee open enrollment status for benefits.
- **Benefit Reconcile Report** – This report shows, by employee, benefits in use by employees and shows the details for the scheduled amounts paid by employer. Other employee accounts details can be pulled into the report.
- **YTD Amounts Paid** – This report shows, by benefit type, the earning deduction and employee and employer sum amounts.
- **Benefit Questionnaire Answers** – This report shows questions used in benefit questionnaires. It shows the question label, question answer, answer type, and date completed.
- **ACA Audit Trail** – This report is an audit trail for the ACA module and shows new/old values, by employee and EIN and the details of the changes.

HR Reports

My Info > My Reports > HR Reports > Employee Maintenance

- **All HR Action Requests** – This report shows all the HR Action requests and the details of each request. This report has action icons allowing those employees with the proper access to view, edit and delete the requests. Employees and applicants will display in this report. Current, past and future-dated requests will display.
- **Base Compensation History** – This report pulls information from employee accounts and shows the details of each employee's compensation.
- **Detailed Rates** – This report shows all rates (Personal and Global) for each employee, by EIN. Users with editing rights can edit the rate table from this report. An icon to open employee information is available to verify employee information.
- **Job Change History** – For employees with an assigned Job, this report shows the changes made to move employees from one job to another.
- **Job Info History** – This report shows audit information for the Jobs in the system. It shows who changed the job, what was changed, and other details of the action performed.

HR Maintenance Menu - My Info > My Reports > HR Reports > HR Maintenance

- **Cost Centers Accessible To Employee** – This report displays, by employee, all the cost centers they can access. It will show the EIN, cost center tree and cost center full name.
- **EEO Classification** – This report shows all employees and their EEO classifications, as defined within their employee accounts.
- **Employee Contacts** – This report provides a detailed list of all employee contacts.
- **Employee Contracts** – This report shows all details related to employee contracts.
- **Employee Headcount** – This report shows employee status (terminated/active/leave of absence/not in payroll and more.)
- **Employee Notes** – This report shows all notes associated with an employee.
- **Employee Roster** – This report shows all basic information and main settings for each employee based on their employee account information.
- **Employee Status Changes** – This report shows all employees that have had an account status change (active/terminated/leave.)
- **Employee Summary** – This report shows, by employee, their access to cost centers and managers assigned to them. Multiple employee account columns can be added for a full picture of the employee accounts.
- **Ethnicity (Summary)** – This report shows all employees and their ethnicity. Data is pulled from employee accounts.

- **Hardware Settings** – This report shows, by employee, the authority level for the hardware devices in use.
- **Pay Grades (Assigned to Employee)** – This report shows all employees and their pay grades. Details of pay grades such as minimum, mid and maximum can be optionally included in the report. A *Rates Effective From* column is in the *Effective Pay Grades* widget of the report, along with an *Include All Pay Grade Ranges* setting. The column will display current employee Min/Max/Mid pay grades. The setting will allow past and future-dated changes to be displayed.
- **Seniority** – This report shows all employee dates (hired, started, etc.)
- **Veterans (Summary)** – This report shows all employees and designates if any are veterans.

Turnover Menu - My Info > My Reports > HR Reports > Turnover

- **Termination By Reason Code** – Provides data for terminations including the year, the termination code(s) used, and total for each instance.
- **Turnover Rates** – Provides data for terminations based on turnover rates, which are calculated as 100% (Total terminations over previous 12 months/average headcount over previous 12 months.)
- **Turnover Rates By Cost Center** – Provides data for terminations incurred by cost center. Columns will display actual terminations, actual headcount, headcount at the beginning of each month, headcount at the end of each month, total terminations over the previous 12 months, average headcount over the previous 12 months, and turnover rates over the previous 12 months. Under the gear icon, in the *Termination* section, you can add *Terminated By Worker Type*. When checked, this data will be included in the *Summary* section of the report and will pull the worker type from the terminated employee's account.
- **Turnover Statistics** – Provides reports for Termination by Reason Code, Turnover Rates and Turnover Statistics. The *Use Average Active Count Per Day For Turnover Calculation* setting will define the active number of employees each day for a period, sums up the numbers, and divides the sum by the number of reviewed days. The result displays as the Active Count in the report.
- **Turnover By EIN** – For multi-EIN companies, this report will show turnover by EIN. The report contains a Company EIN Filter option that allows you to include/exclude EINs. Date ranges and employee filters are also available to further define the included data. This report is not available to single EIN companies.

Talent Reports

My Info > My Reports > Talent Reports

- **Performance Reviews Report** – This report shows the details of employee performance reviews, including reviewer name, scheduled date, comments, core values, goals, competencies, review rating and more.
- **Peer Feedback Report** – Part of the performance review process, peer feedback can be used. This report shows the employees providing feedback and who the feedback was provided for.

Compensation Reports

My Info > My Reports > Compensation Reports

- **Manager Budget** – If using the Compensation module, this report shows, by manager, the budgets created and the details of the budget.
- **Process Results** – If using the Compensation module, this report shows, by employee and EIN, the compensation cycle in use, when it was added and other employee account details that can be added to the report.
- **Proposal Status** - If using the Compensation module, this report shows, by employee, the results of their compensation proposals (submitted, approved, finalized.)

Payroll Reports

Payroll Funding Menu - My Info > My Reports > Payroll Reports > Payroll Funding

- **Adjustments/Arrearages** –
- **Bank Account Transactions** –

- Payroll Funding –
- Payroll Payments –
- Payroll Recap & Funding –
- Payroll Recap & Funding (Pre Process) (Beta) –
- Vendor Payments -

Post Payroll Funding Menu - My Info > My Reports > Payroll Reports > Post Payroll Funding

- General Ledger (Summary) –
- General Ledger (Summary) Enhanced Accruals –
- Workers Comp Code (Summary) –
- Retirement Plan Report Summary –
- Retirement Plan Report Detail -

Pay History Menu - My Info > My Reports > Payroll Reports > Pay History

- Child Support Calculation Details –
- Garnishment Calculation Details –
- Pay Statement History –
- Pay Statement History (Imported) –
- Pay Statement History (Summary) –
- Earning/Deduction/Tax Listing –
- Earning/Deduction/Tax Listing (Summary) –
- Pay Statement Records History –
- Pay Statement (Benefit Coverage) –
- Payroll Alerts -

Payroll Register Menu - My Info > My Reports > Payroll Reports > Payroll Register

- Payroll Register -

Labor Distribution Menu - My Info > My Reports > Payroll Reports > Labor Distribution

- Labor Distribution -

Taxes Menu - My Info > My Reports > Payroll Reports > Taxes

- Tax Wage Details –
- Tax Documents –
- Form W2s (Summary) –
- Tax Variance -

Miscellaneous Menu - My Info > My Reports > Payroll Reports > Miscellaneous

- Benefits Statement (Printing) –
- Tip Credit Report -

Audit Trail Menu - My Info > My Reports > Payroll Reports > Audit Trail

- Company Taxes -

Recruitment Reports

My Info > My Reports > Recruitment Reports

- **Time to Hire** - This report will display each job requisition, along with the Start and End Date of each requisition and the total number of days the requisition will be (or was) open. The report also has a *Time to Hire* column which will determine how long it took to hire an employee for a specific job requisition. If a position has not yet been filled, the requisition will still display, without an employee attached and no *Time to Hire* data.

System Reports

Access Control Menu - My Info > My Reports > System Reports > Access Control

- **Access Attendance Board** – This report shows the employees the user has access to and shows attendance status (In/Out), latest in/out, last date in/out, time since last in/out, and last zone accessed.
- **Employee Access History** – This report shows employee access statistics when using the Access module. It will show employee name, punch badge number, access time, intelligent unit/door/reader used, the zone, the punch type, and punch code.
- **Remote Device Access** – This report shows remote employee access statistics when using the Access module. It will show device ID, intelligent unit information, key code, remote badge ID used, response type, punch code, employee ID/username/EIN and access time.
- **Unknown Badge Usage** – This report shows information when employees use an unknown badge type with the Access module. It will show employee name, punch badge number, access time, intelligent unit information, zone, punch type and punch code.
- **Visitor Access History** – This report shows visitor history when badging in with the Access module. It shows employee name, punch badge number, access time, intelligent unit information, zone, punch type and punch code.
- **Zone Access History** – This report shows employee zone access when using the Access module. It shows employee name, punch badge number, access time, intelligent unit information, punch type and punch code.
- **Zone Access Status** – This report shows employee access to zones when using the Access module. It shows employee name, punch badge number, access time and intelligent unit information.

Audit Trail Menu - My Info > My Reports > System Reports > Audit Trail

- **Account Info** - All changes to account information (employee information-no logic).
- **Applicant Info** – All changes to applicant information and is only available if using the Recruitment module.
- **E-Signature Audit** – When employees sign documents using e-signatures, this data is gathered and included in this report. Signatures can come from Face ID, Touch ID, I9 signed, TFN Declaration signed, other forms signed, HR Actions signed, Checklists signed, W-4 signed, Everything Benefits signed, Data removed signed, ACA electronic consent. This will include multiple signature types, such as Last 4 of National ID, or full National ID.
- **E-Signature Audit (Applicants)** – When applicants sign documents using e-signatures, this data is gathered and included in this report. Signatures can come from Face ID, Touch ID, I9 signed, TFN Declaration signed, other forms signed, HR Actions signed, Checklists signed, W-4 signed, Everything Benefits signed, Data removed signed, ACA electronic consent, or other applicant related data. This will include multiple signature types, such as Last 4 of National ID, or full National ID.
- **Master Data Changes** – This audit report shows all information changed for all employee accounts.
- **Middleware Password Audit** – This audit report shows the middleware password changes made to employees by EIN.
- **Virtual Code Authentication** – This audit report shows all changes made to VCA codes by employee.

- **Position Assignment History** – Will show the audit history for changes made to position assignments. This is only available if Position Management is enabled in your company. When users navigate to this report directly, the default will be set for all assignments and will show any changes made that day (i.e. date filter is set to Today). When users navigate to this report via the Assignments to Positions widget on the Employee Profile, it will be pre-filtered for that particular employee.

System Utilities Menu - My Info > My Reports > System Reports > System Utilities

- **All Cost Centers** – This report shows all configured Cost Centers in the system.
- **All Punches** – This report shows the punch time, status, punch badge ID and source type.
- **Global Access** – Shows all employees who have logged in and shows from which IP Address. The Source Type column, which can be added to the report, will display how the user logged into the system. The column will populate with one of the following: New_UI_Mobile_App, New_UI_Mobile_Browser, New_UI_Browser, HCM_Mobile_Browser, HCM_Browser, Classic_Browser, Classic_Mobile_Browser, Classic_Mobile_App.
- **Group Membership** – This report shows all groups in the company and shows the employees per group.
- **Mailbox** – This report shows mailbox information such as email, recipient, subject, body, if it was read, and when it was created.
- **Popup Communicator Usage** – This report shows the status of the popup communicator usage in the system and shows the number of times used and if the message will be shown again.
- **REST Invocations** – This report shows the REST APIs used by company and includes URL information, server name, date entered and more.
- **SSNVS Verifications History** – This report shows the history of employees who have been verified using the SSNVS system of verification.
- **Swipe Summary** – This report shows a history of employee punches and number of times they punched or swiped into the company.
- **Unprocessed Punches** – This report shows all punches that were entered into the system, but not processed (due to offline clocks and other reasons).

Charts

Partnered with the already robust reporting capabilities that exist across the entire product suite, users can take this data and create charts that provide key insights that are important to managers of all levels.

About Charts

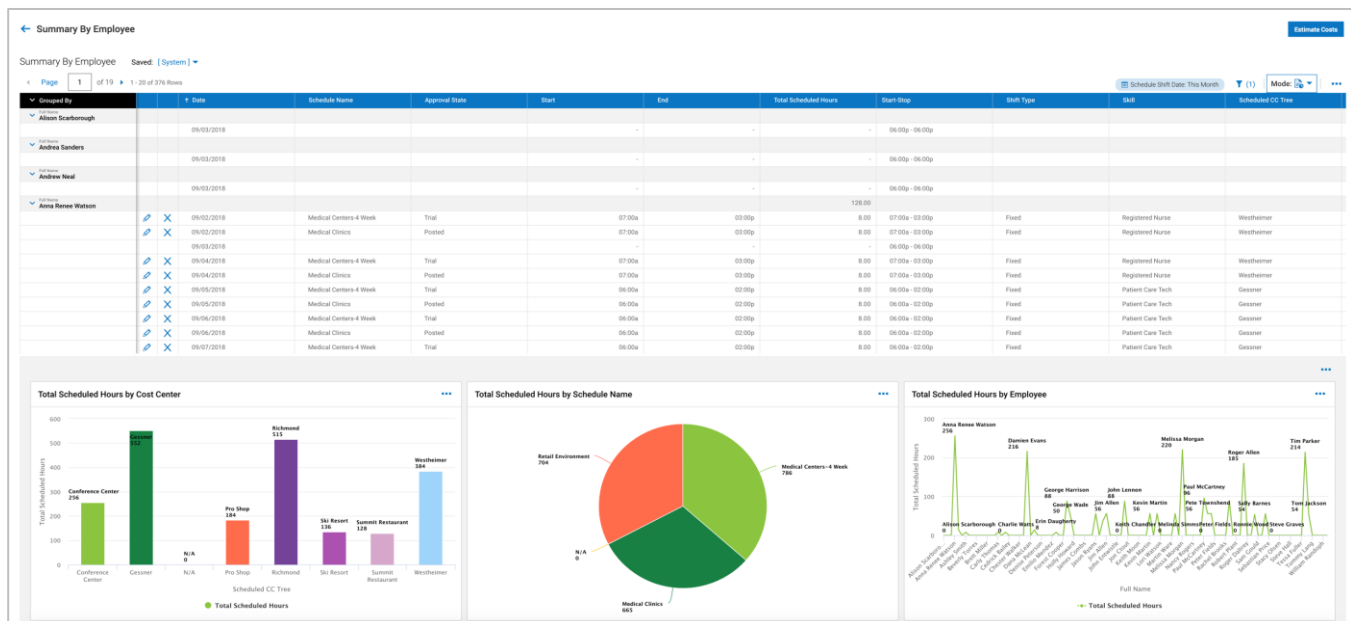
- All charts created will reflect the complete report provided above it. For example, if there are six pages for a report and you are looking at only the first page, the charts will show data from all six pages.
- All charts will be filtered based on the report as well. If the default date range for the report is **Today**, and then this is changed to *This Week*, all charts will instantly update along with the report.
- Charts are associated with report views. Once saved, and if you decide to share the report view, the charts will be shared with it.
- There is a maximum limit of 3 charts that can be created for a single report view.
- If a report does not support charting (charting is turned off), an informational message appears explaining that *Chart functionality is not currently available for this report*. The message appears when first loading the report only. This applies mostly to system audit reports.
- Users can use percentage data in charts to identify trends that may require further investigation.

For example, the Checklists report (*Team > HR > Checklists > Checklists*) includes a default column for % *Completed*. This details the progress each employee has made for their given checklist they are completing, and this information can be included in charts (available as a Metric when configuring a chart).

- Each report/list page includes an option to refresh the data on the screen and is located in the action ellipses menu for the report. The refresh also refreshes the data in the corresponding charts.

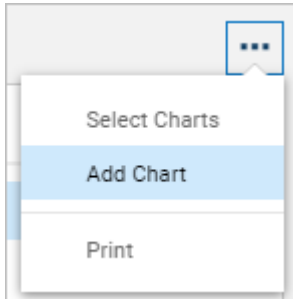
Report View Modes

In a report that supports charts, you will have the option to view the report as *Data Only*, *Charts Only* or both *Charts & Data*.



Creating Charts

Once the chart panel is open, you can create a new chart. The charts panel has its own actions ellipses menu that you can use to add more charts. If you have reached your maximum allowed number of charts, the *Add Chart* option will be grayed out and inaccessible.



Upon selecting *Add Chart*, a side panel will open with options for creating a new chart.

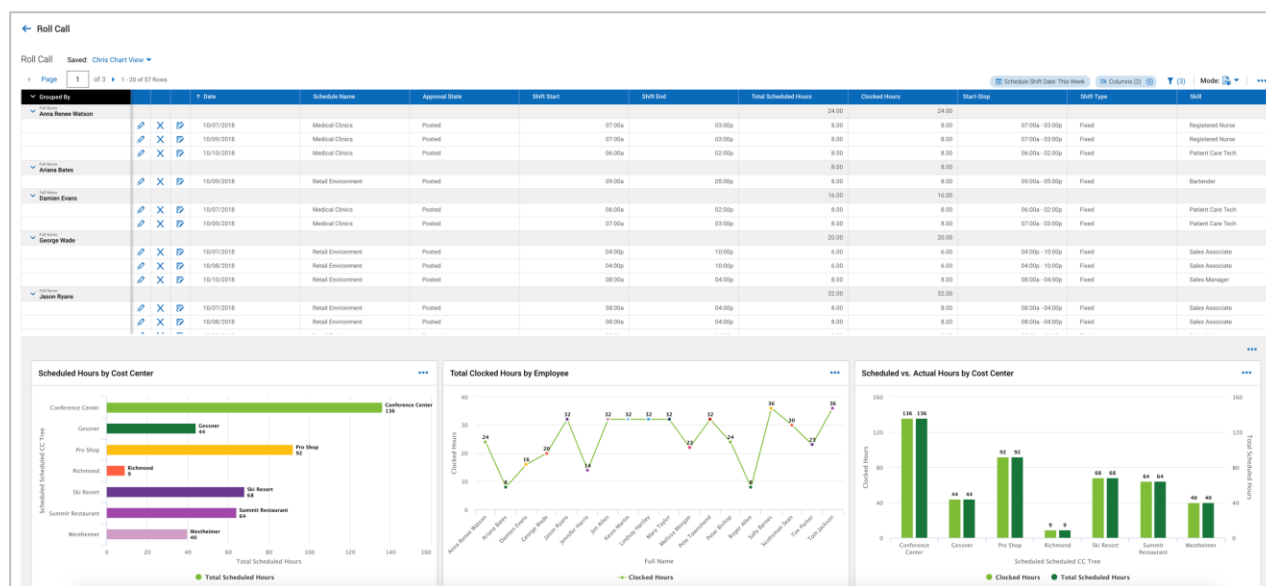
A screenshot of a side panel titled 'Add Chart' with a close button (X) in the top right. The panel is organized into several sections: 1. 'Chart Type *' with five icons representing different chart types: Horizontal Bar Chart, Vertical Bar Chart, Line Chart, Pie Chart, and Heat Map. 2. 'Data' section containing two dropdown menus. The first is 'Category (Y-axis) *' with 'Benefit Plan Name' selected and a '+' icon to its right. Below it is a checkbox 'Show as a stacked chart'. The second dropdown is 'Metric (X-axis) *' with 'Record Amount' selected and a '+' icon to its right. 3. 'Chart Display' section with four checkboxes: 'Category Title (Y-axis)' (checked), 'Metric Title (X-axis)' (checked), 'Category Labels (Y-axis)' (unchecked), and 'Data Labels (X-axis)' (unchecked). 4. 'Title *' section with a text input field containing 'Record Amount by Benefit Plan Name' and a preview of the title below it.

- **Chart Type** - You have the option of several chart types and each type has hover text explaining the type.
 - Horizontal Bar Chart
 - Vertical Bar Chart
 - Line Chart
 - Pie Chart
 - Heat Map

NOTE: Users can see what each Chart Type icon represents via a Tooltip when building a chart. This applies to Succession Planning charts as well (see Addendum).

- **Category** - Select the applicable category to use for your chart (ex: *Employee Name, Date, Cost Center, Skill, Status*)
 - The provided list will only show columns that are currently in the report view. If you wish to use a category that is not in the report, proceed to add the column to the report and then return to this view.
- **Metric** - Select the applicable metric to use for your chart (ex: *Scheduled Hours, Actual Hours, Account ID, Row Count*). More than one metric can be added by clicking the plus sign.
 - The same rule about categories applies to metrics - the applicable metric must already be present in the data report to use it for the chart. There will always be a *Row Count* metric available in each report.
 - You can also use multiple metrics (such as comparing scheduled hours & actual hours)
- **Value Calculation** – Depending which metric is selected, you may need to select a value calculation. Select from the drop-down and continue building the chart based on required values.
- **Chart Display** - The chart display section will feature chart attributes (titles for category and metric labels will all be checked by default). A chart *Title* will be defaulted to reflect both the category and metric used. This can be modified if you choose. The auto-populated title will always appear beneath the title field for reference.
 - **Category Title (X-axis)** – This will title your chart across the bottom of the chart with the name set in the *Category (X-axis)* drop-down in the *Data* section.
 - **Metric Title (Y-axis)** – This will add the metric title to the left side of your chart title with the name set in the *Metric (Y-axis)* drop-down in the *Data* section.
 - **Category Labels (X-axis)** – This will add category labels within the metrics of your chart on the horizontal axis.
 - **Data Labels (Y-axis)** – This will add data labels within the metrics of your chart.

Upon saving, the chart will display in the panel provided.



Multiple Categories in Charts

Users can utilize more than two categories when building a chart. The metrics must use the same calculation. For example, in Succession Planning the following might be used:

- Employee History Graph to review Potential and Performance measures for a single employee
- Metric Bar Chart to examine the distribution of Risk of Loss and Readiness

In succession planning, users may need to chart using a wide combination of categories. In addition to the items mentioned above, you may need to track employee history based on:

- Impact of Loss
- Reliability
- Happiness
- Collaboration

This is available across the board for normal chart configuration.

Selecting Charts

Once a chart is created, it is automatically saved and added to the library of charts that can be used for the particular report view you are using. To access these saved charts, in the charts action ellipses menu, select the *Select Charts* option.

A *Charts* side panel will open and will list all charts that have been created for the report. Use the checkboxes to select and then show the chart(s) you need for the report. There are additional options provided to edit or delete a particular chart. New charts can be added from this panel by selecting the *Add New* link.

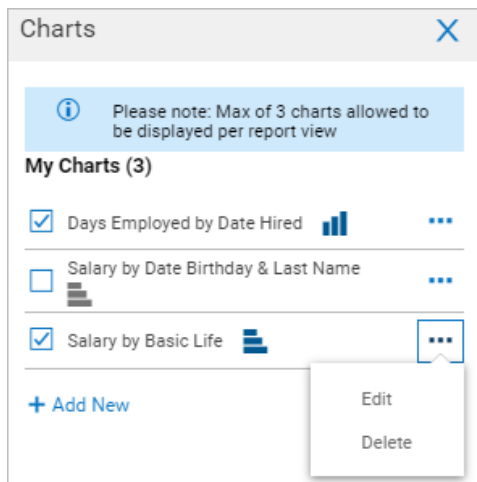
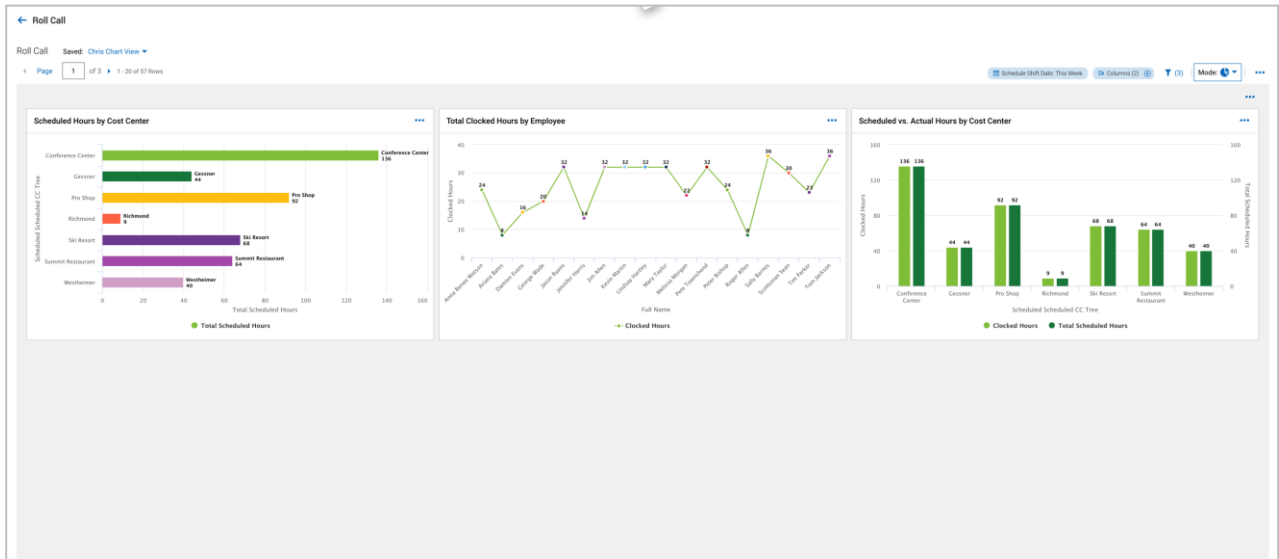


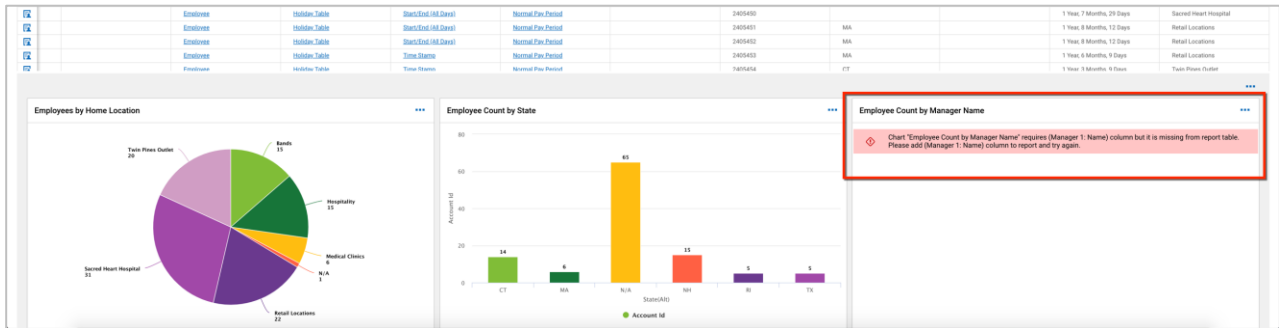
Chart Views

Once you have charts pulled into your selected report, there are important items to know:

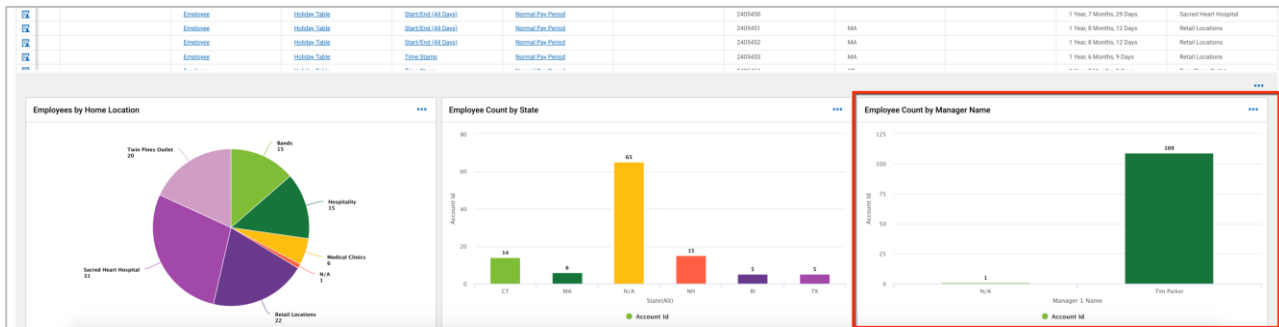
- A single chart will consume the entire space of the chart panel. This will resize based on the number of charts that are created and displayed.
- There is a menu option in each displayed chart that will provide access to edit the chart as well as remove from view.



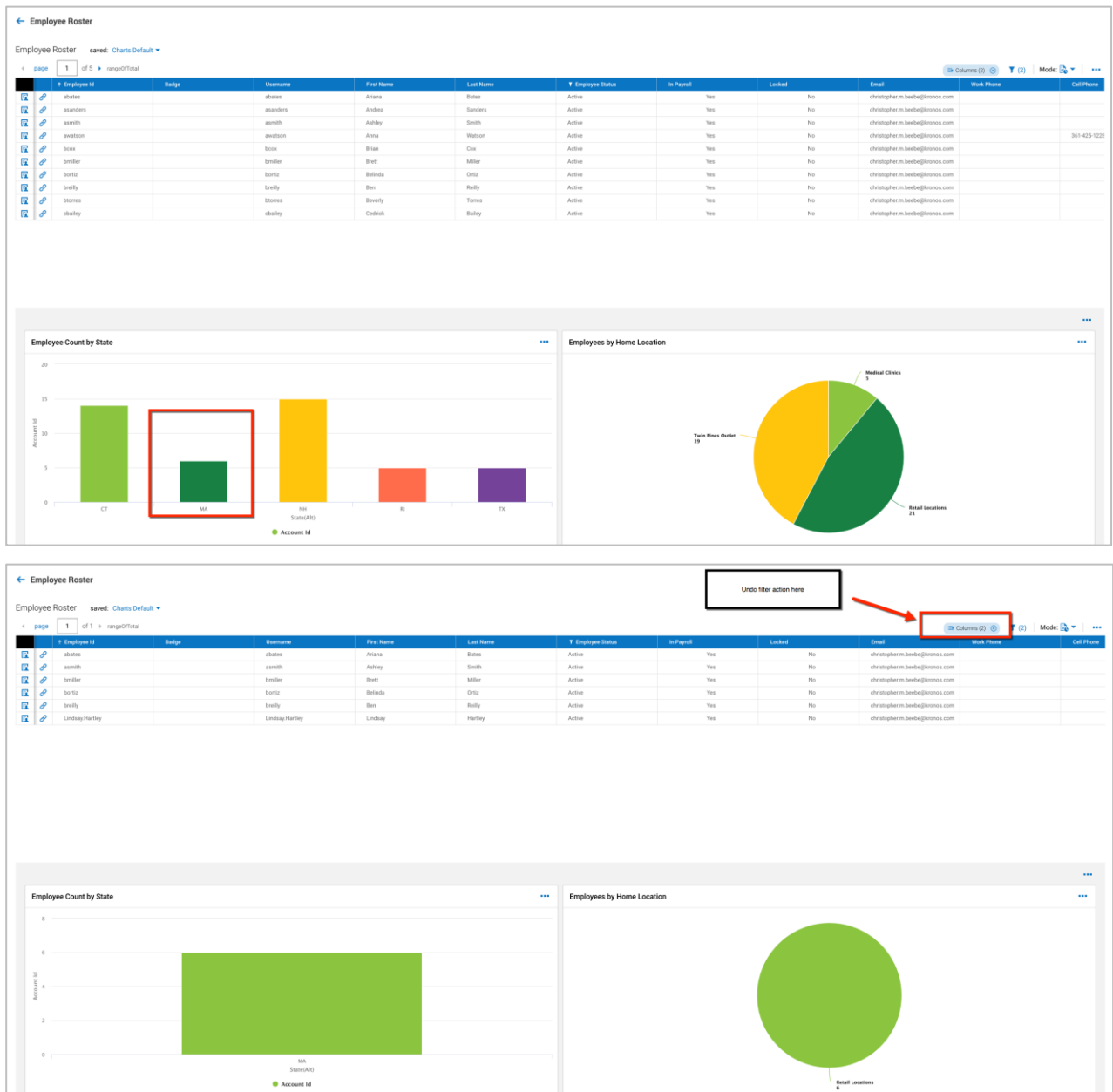
- If a chart was created using a category or metric that is no longer in the report, you will see an error message in the chart itself.



- Add the applicable columns back in the report and the chart will refresh.



- Users can click inside any data point in any chart to filter not only the data above, but any additional chart in the view. To reset the charts and data, adjust the filter "pill" featured on the report.



- When a tile is added as a Chart to a Dashboard in a Report View with 2 or more assigned Charts, if the parent chart is deleted from the Report View, the added tile is switched to the next chart from the set. If a parent report is deleted, the child tile is also deleted from the Dashboard.

When a tile is added as a Chart to a Dashboard in a Report View with only 1 assigned Chart, if the parent chart is deleted from the report view, the added tile is switched to *Data Only* mode and the Report View remains the same.

When a tile is added to a Dashboard as a report in a custom Report View, if the parent report is deleted from the report view, the added tile is switched to [System] Report View in *Data Only* mode. The same occurs when a tile is added to a Dashboard as a chart in a custom Report View and the parent report is deleted from the Report View.

Dashboards

The system has multiple types of dashboards available. The types of dashboards available to users are determined by enabling settings in the New UI Dashboard Layout Profile and then assigning the profile to their employee accounts.

- **Home Landing Page** – The Home dashboard is the main dashboard users see when initially logging into the system. This dashboard is controlled through a profile assigned to your users. This is optional and other first screen options are available.
- **My Dashboard** - Each user can also have a My Dashboard enabled, which allows them to have report charts that are important to their role.
- **Domain Dashboards** - In the manager Team menu there are dashboards known as Domain (module) Dashboards that are available under each menu item (My Team, Time, Accruals, Leave, etc.) These types of dashboards allow managers to create a customized view of reports and charts.

First Screen Options

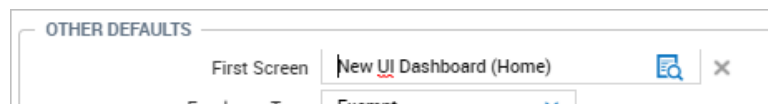
Before you configure the New UI Dashboard Profile and assign to your employees, you should be aware there are multiple areas in the system where *First Screen* options can be set. The *First Screen* option controls what a user will see as their first or home page when logging into the system.

This field is in several areas of the system, and in this field, you can select the following options.

- **Blank** – Users will see a blank page but can navigate using the hamburger menu.
 - If a user account has a null value for First Screen, as long as the user has a New UI Dashboard Layout Profile assigned in the Profiles widget of their employee account, they will see the New UI Dashboard (Home) page when logging in.
- **Security Profile Default** – Whatever is set in the First Field of the user's security profile is the default.
- **Applicant: My Profile** – Will display the My Profile page applicants will see.
- **Company Employees** – Users will see employee they have access to.
- **My Saved Reports** – Users will see the saved reports page.
- **New UI Dashboard (Home)** – Users will see the New UI Dashboard profile.

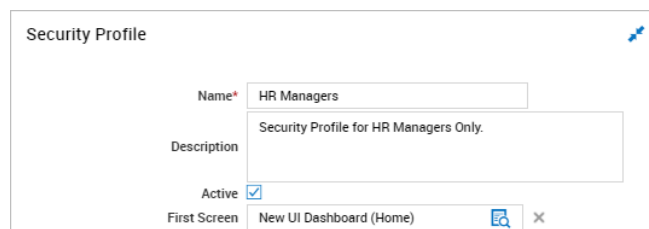
First Screen Option in Company Setup

In the *Other Defaults* section under the *Defaults* tab of *Company Setup*, a *First Screen* setting is available. When an employee is hired, this is automatically populated in their employee profile for the *First Screen* field. This is located under *Company Settings > Global Setup > Company Setup*.



First Screen Option in Security Profiles

In the *Security Profile* widget of security profiles, the *First Screen* set here will populate a new hire's *First Screen* field in their employee account. This value will override what is set in the *Defaults* widget of *Company Setup*.



First Screen Option in Cost Centers

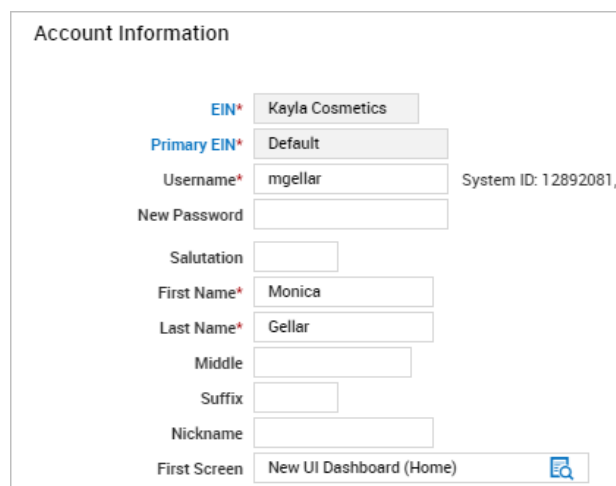
Administrators and/or managers can add the *First Screen* as a Cost Center default for a particular level. When an employee is hired and the Cost Center value is selected, the default settings pop-up will display the *First Screen* value. Once the employee is hired, this is automatically populated into their employee account for the *First Screen* field. . If this value is set to something other than the *Security Profile Default*, the value overrides whatever is set in the Security Profile.



The screenshot shows a 'SETTINGS' window with two rows. The first row is 'Access Policy' with a dropdown menu and a magnifying glass icon. The second row is 'First Screen' with a dropdown menu showing '[Security Profile Default]' and a magnifying glass icon, and a close button (X) to its right.

First Screen Option in Employee Information

In employee accounts, the *First Screen* option listed in the *Account Information* widget has priority over all other areas of the system where a First Screen setting can be listed.

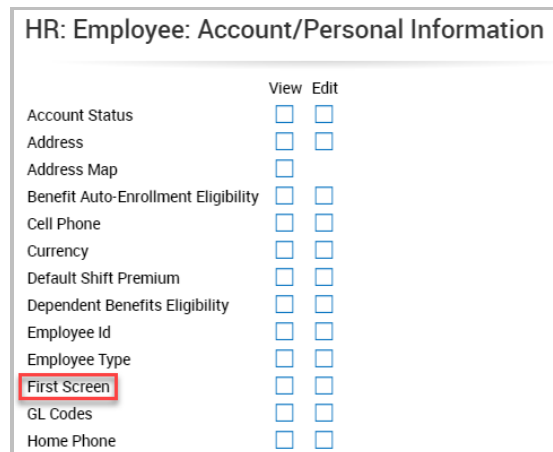


The screenshot shows the 'Account Information' widget. It contains several input fields: EIN* (Kayla Cosmetics), Primary EIN* (Default), Username* (mgellar), New Password, Salutation, First Name* (Monica), Last Name* (Gellar), Middle, Suffix, Nickname, and First Screen (New UI Dashboard (Home)). A System ID: 12892081, is displayed next to the Username field. A magnifying glass icon is next to the First Screen field.

First Screen Option in Mass Edit

Users with access to the Mass Edit Profiles functionality (*Company Settings > Mass Edit > Mass Edit Profiles*), can select multiple employees and set their *First Screen* field to either the *Security Profile Default* or another available value. Once the changes are applied, they will override whatever value was originally set in the employees' accounts.

NOTE: The security permissions for the *First Screen* field are in the *Employee* section on the *HR* and *ESS* tabs within the *Account/Personal Information* security item when the drop-down is set to *View/Edit (Custom)*. The *First Screen* setting should be enabled for *View* and *Edit*.



The screenshot shows a table titled 'HR: Employee: Account/Personal Information'. The table has two columns: 'View' and 'Edit'. The rows are: Account Status, Address, Address Map, Benefit Auto-Enrollment Eligibility, Cell Phone, Currency, Default Shift Premium, Dependent Benefits Eligibility, Employee Id, Employee Type, First Screen (highlighted with a red box), GL Codes, and Home Phone. Each row has checkboxes for the View and Edit columns.

	View	Edit
Account Status	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>
Address Map	<input type="checkbox"/>	
Benefit Auto-Enrollment Eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone	<input type="checkbox"/>	<input type="checkbox"/>
Currency	<input type="checkbox"/>	<input type="checkbox"/>
Default Shift Premium	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Benefits Eligibility	<input type="checkbox"/>	<input type="checkbox"/>
Employee Id	<input type="checkbox"/>	<input type="checkbox"/>
Employee Type	<input type="checkbox"/>	<input type="checkbox"/>
First Screen	<input type="checkbox"/>	<input type="checkbox"/>
GL Codes	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>

New UI Dashboard Layout Profile

The Home page within the application is configured through the New UI Dashboard Profile, which is located under *Company Settings > Profiles/Policies > New UI Dashboard Layout*. A default profile is available to get you started. You can edit and/or clone this profile and then edit as needed.

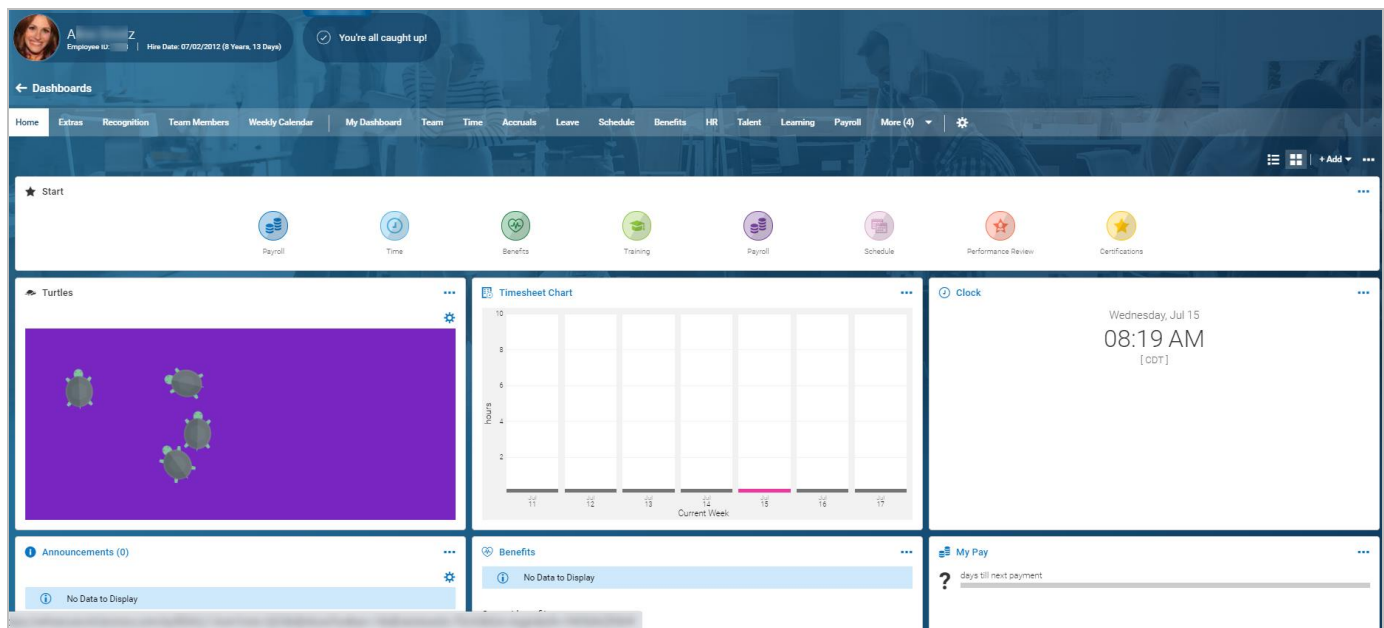
This profile must be assigned to your employees if you wish for your users to have access to the widgets available in the Home view. The assigning of the profile also controls whether the Home button displays on the bottom of their hamburger menu.

The New UI Dashboard Layout profile can be used with any combination of TLM, Scheduler, HR, or Payroll modules.

Home (Landing Page) Dashboard

The Home landing page dashboard is made up of widgets. The widgets on the home landing page provide easy access to commonly used items and can include personal information as well as managerial information. The content of these pages will vary based on user security permissions, subsystems enabled for the company and configuration of the widgets themselves.

The Home page can be viewed at any time by clicking the *Home* link at the bottom of the hamburger menu.

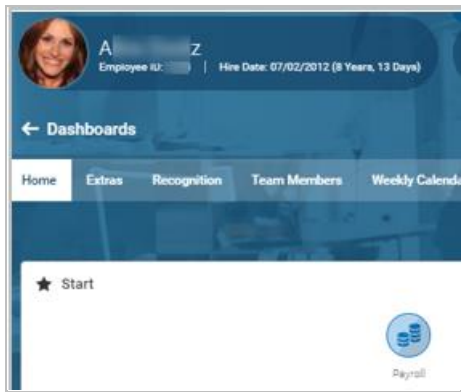


Employee Banner

The Employee Banner displays on the Home tab to improve the visual experience by adding color and additional details. The following data displays for the user:

- The user's full name (First Name, Last Name) from their primary EIN account.
- The user's Job/Position Title followed by the name of the primary EIN, separated by a comma.
 - If no Job or Position titles are available, the Job Title line does not display in the banner.
 - If the user has a saved Default Job in his/her profile and has saved Position data, the Job Position shows the Position value in the banner.
 - If the user has a saved Default Job in his/her profile and does not have Position data, the Job Title shows the Default Job in the banner.
- The user's Employee ID in parentheses to the right of his/her name.

The employee's picture also displays in the top left corner. If no employee picture is uploaded, the employee's initials with the blue background display.



Users can navigate to their Employee Profile from the Dashboard Banner by clicking on their name or their profile image on the Landing Dashboard Banner.

Configuring New UI Dashboard Layout Profiles

Navigate to *Company Settings > Profiles/Policies > New UI Dashboard Layout*. A default profile is available, which can be copied and edited for each profile, or you can create a new profile by selecting *New Layout Profile*.

Dashboard Layout Profile

Name*

Description

Active ☒

Dashboards Visibility

Show Custom Dashboards ☒

Show My Dashboard ☒

Show Domain Dashboards ☒

Show Start Screen (Mobile Only) ☐ ?

HAMBURGER MENU SETTINGS

Show Home Button ☒

Show Classic Dashboard Button ☒

Display following dashboard if none is set

Schedule

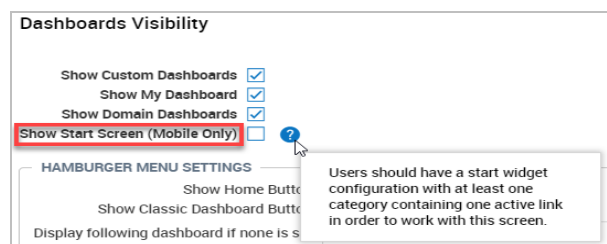
Add Announcement

	EFFECTIVE FROM/TO	USER CAN MODIFY	RESET LAYOUT
	12/31/1900	12/31/9999	<input checked="" type="checkbox"/> [Reset]

- **Name/Description/Active** – Enter the name and optional description of the profile. Uncheck *Active* if the profile is not to be used or assigned. Be sure to save the profile after entering this information. Saving will activate the edit ability in the *Schedule* widget.
- **Show Custom Dashboards** – Checking this option enables the Home view containing the Employee Banner and Widgets. The widgets that display in the **Home** page are determined by the **New UI Dashboard Layout** profile, located under *Company Settings > Profiles/Policies > New UI Dashboard Layout*.
IMPORTANT NOTE: The First Screen in a user's account profile determines which page is used as the Landing page. Consequently, even if **Show Custom Dashboards** is enabled, a different page may appear as the Landing page. For example, if the **First Screen** setting is set to **Dashboard** in the Account Information of the user's profile, the user's Classic UI Dashboard is displayed.
- **Show My Dashboard** – Checking this option enables the My Dashboard option so users can create their own report charts.
- **Show Domain Dashboards** – Checking this option allows managers to view and/or create dashboards under each enabled Domain/module under the Team menu. i.e. Time has a dashboard, Accruals has a dashboard, Schedule has a dashboard, etc. Under these dashboards, managers can add Report Charts that provide important information at a glance and will update in real time.
- **Show Start Screen (Mobile Only)** – This option can be enabled to make the Start Widget an available screen/page in the Mobile Application. A tooltip is available with additional information.

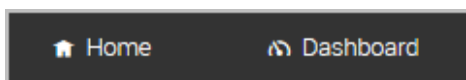
Start Screen in the Mobile Application

Administrators can enable an option in the New UI Dashboard Layout Profile to expose the Start Widget as a screen/page in the Mobile Application. The **Show Start Screen (Mobile Only)** option can be enabled in the *Dashboards Visibility* section in the New UI Dashboard Layout Profile to make the Start Widget an available screen/page in the app. A tooltip provides helpful information.



Hamburger Menu Settings

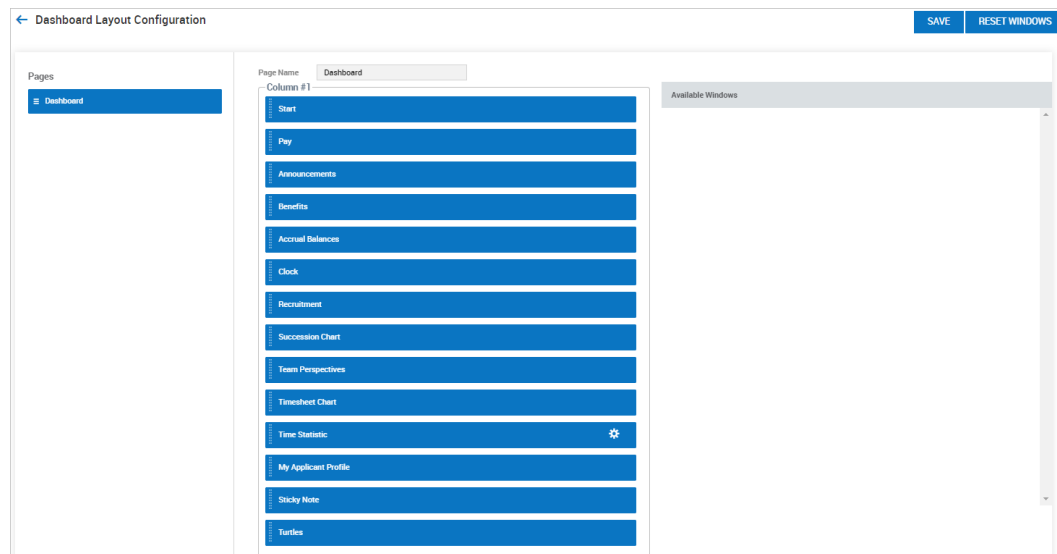
- **Show Home Button** – Checking this option will enable the Home button within the hamburger menu, and when tapped by the user, will display the Home dashboard.
- **Show Classic Dashboard Button** – Checking this option will enable the Dashboard button within the hamburger menu, and when tapped by the user, will display their assigned Classic UI dashboard.
- **Display following dashboard if none is set** – Allows for the selection of Dashboard or Dashboard (Premium) if no dashboard has been configured and set for the user.
- When the **Show Home Button** and **Show Classic Dashboard Button** settings are checked within the Hamburger Menu Settings section of the profile, **Home** and **Dashboard** links will display within the user's hamburger menu.



- **Schedule** – Dashboard Layout Profiles can be effective-dated, and more than one time period can be added by clicking the Plus (+) sign and adding a new effective date. The profiles will become active as the dates roll up. Click the edit icon to open the dashboard to add/remove widgets.

Schedule

This dashboard profile contains only one (1) column to save space/scrolling since it can be used within the Mobile App. The *Available Windows* can be dragged and arranged in the desired order. The users will see all the configured windows or widgets on their Home view when logging in to the application.



Adding Widgets in the New Dashboard Layout Configuration

Administrators can add widgets in the New Dashboard Layout configuration when they have permissions to View/Edit the New UI Dashboard Layout Profile (*Company Settings > Profiles/Policies > New UI Dashboard Layout, Edit*).

Users can see the option to add tiles at the top of the layout configuration screen. If a tab already has the maximum of 9 tiles added, **+Add** is disabled. When hovering over the action, the following Tooltip displays: *Max of 9 tiles are allowed to be displayed per dashboard*.

When a user clicks on the Add button, a drop-down appears with a Widget option. When a user selects the Widget drop-down, the pop-up opens and the user can see a list of Available widgets and Current widgets. Users can select the appropriate checkbox(es) for the widget(s) they wish to add. A widget can only be added once, and if already selected, it appears in the list of Current widgets.

If a user does not have permissions to see a widget that is added, the widget does not appear for the user.

NOTE: Users with the appropriate security settings can configure widgets from the Dashboard. For example, users can click the gear icon from the *Time Statistic* widget, which leads to the configuration pop-up where the user can set or adjust settings. If a New UI Dashboard profile is assigned or a new Effective Date is set by an administrator, it overrides the user's widget configuration.

Adding Default Widgets to the New UI Dashboard Layout Configuration

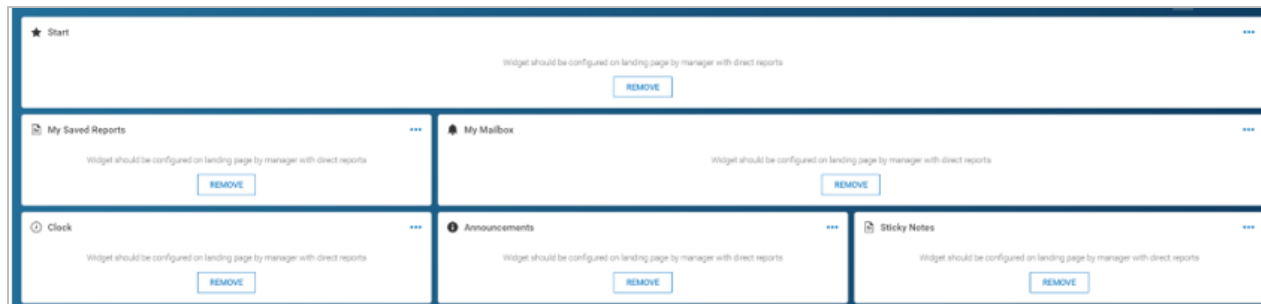
Users with the appropriate security permissions to View and Edit the New UI Dashboard Layout Profile can add default widgets on the configuration page under *Company Settings > Profiles/Policies > New UI Dashboard Layout, View/Edit New UI Dashboard Layout Profile*. When the user creates a new schedule:

- The system pulls the previous schedule to the newly added schedule by default.
- The **Add Sample Widgets** button appears in case all widgets are missing from the page.
- The **Add Sample Widgets** button appears when a user creates a new tab in the layout profile, which allows a user to add all default widgets.



The following tiles are placed by default in the following order:

- Start
- My Saved Reports
- My Mailbox
- Clock
- Announcements
- Sticky Notes



If all tiles are removed from a tab or new tabs are added to the layout:

- The **+Add** placeholder appears with the option to add a single new tile. Upon clicking **+Add**, the user has the option to select between *Widget* or *Report/Chart*.
- The **Add Sample Widgets** button appears, which allows the user to add all default widgets.

Adding Widgets to My Landing Dashboard

Users can add widgets to the My Landing Dashboard Layout when the New Dashboard is in use. The user must have:

- The new Dashboard Profile assigned (for the Landing experience).
- Permissions to modify the Dashboard Layout (for the Landing experience).
- Navigated to the Landing Dashboard.

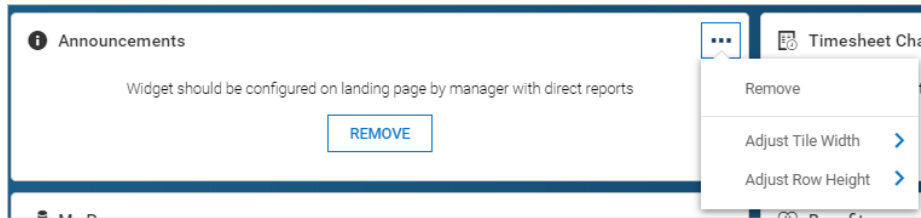
The option to Add (**+Add**) tiles displays at the top of the Layout Configuration screen. When a user clicks on the **+Add** button, a drop-down displays with a **Widget** option. When the user selects the **Widget** drop-down, a pop-up opens and displays a list of available and current widgets. If a user does not have permissions to see a widget that has been added, the widget does not appear for the user.

A maximum of 9 combined total widgets are allowed. If a tab already has 9 widgets added, the **+Add** is disabled.

If a user saves on the Add Tiles screen, the tiles appear on the tab the user was on prior to clicking the **Continue** button.

Available Widgets

The widgets will have an action ellipses with options to remove and adjust the tile width and height. A Remove button is available, and some widgets may have additional configuration options.



- **Start** – This widget will display the Favorites menu across the top of the user's session. The *Start Widget Configuration* page, located under *Favorites > Configure Favorites*, can be accessed by users so they can customize their widget. They will have the capability to add a unique color and an icon to each Category for the Start Widget. Or, a Start Widget can be added to security profiles and users will inherit the dashboard set there.
 - The *Default Start Widget* in security profiles is used to give users assigned to the profile the ability to modify the Start widget.
 - Under the ESS tab of security profiles, in the *Dashboard: Allowed Windows* section, the *Start* widget should be enabled.
- **Clock** – This widget will display the current day, date, time, and user's time zone. This widget is typically used by users who need to punch in/out or transfer to another cost center. A *View Timesheet* link will take the users to their current timesheet.
- **Announcements** – This widget is useful for communicating company information to all your users through the use of announcements, which can be configured under *Company Settings > Our Company > Announcements*. Users can tap the Info icon or arrow to read the announcement.
- **Pay** – This widget will display a countdown until the next pay. A *View Pay History* link will allow the user to view their recent and historical pay statements. When viewing pay, two tabs will display, one for Pay History and the other for Direct Deposit. Users can add new direct deposits from the Direct Deposit tab, and e-signatures are available, and when signed, the employee will receive their pay statements electronically.
- **Accrual Balances** – Displays the user's current accrual balances. Info icons are available for each category and a pop-up will display more details.
 - Accruals Policies (*Company Settings > Global Setup > Company Setup* in the *Accruals Policies* section) for the company/EIN should be set to:
 - Display Values in Hours and/or Days.
 - Drop-down in widget should show one or both when selected.
 - Adhere to the Accrual Profile and Global Policies for displaying values as hours or days, per bucket.
 - Display Days with 0-5 decimal places.
 - When a value is selected, the days-based values should express these values with the decimal places specified.
 - Data in the Accrual Balances widget must adhere to the *Subtract Scheduled Hours From Remaining Balance* and *Taken is Calculated From Beginning Of Accrual Year and Up To* settings chosen.
 - Visible Columns (enabled or disabled) that affect certain values displayed in the Tooltip such as Current Accrued, Taken, Current Balance, Available Balance, Taken, Scheduled, and Projected Balance.

If no Accruals Profile is assigned to the user, the Accruals widget displays a message indicating they do not possess an Accruals profile. If the Accruals profile contains no rules/policies that include at least one bucket such as Vacation, the widget displays a message indicating such.
- **Team Perspectives** – The data in this tile is derived from Employee Perspectives, where a manager can view total metrics for their team. A filter is available to change the number of employees included in the totals.

- **Benefits** – This widget will display the user's current benefit enrollments. A *View Benefits* link will allow the user to view their current benefits. When viewing benefits, two tabs will display, one for viewing Benefit Plans and the other for Enrollment in benefits.
- **Recruitment** – For companies using the Recruitment module Marketplace product, this widget can provide HR professionals with information about job requisitions, open requisitions, and the status of the open requisitions. Selectable links are available to view more details.
- **Succession Chart** - For HR companies using Succession Management, the Succession widget can be added to managers. The Succession tile pulls data from the user's talent matrix widget which can be configured, for now, in the Classic UI. Managers can use this tile to gauge readiness and benchmark the strength of their team for possibly filling higher level positions as they become available.
- **Timesheet Chart** – This widget will display a graph of the employee's currently calculated hours for the current days of the current week. If there are no hours registered, the bars will not display. The current day will be highlighted. The chart will continually update as hours are added to the timesheet.
- **Time Statistics** – This widget will display the configured time elements defined in the widget. The statistics will continually update as hours are added or removed. The *Time Statistic* widget contains additional settings, accessed by clicking the *Gear* icon.

Edit Settings

Display ☒

Label

Type

Time Type Period

Display ☒

Label

Type

Time Off

Display ☒

Label

Type

Counters

Display ☒

Label

Type

Counters

- **Display** – Uncheck to not display this type of time statistic to the user on their dashboard widget.
- **Label** – Allows you to customize the name of this type of time statistic the user will see.
- **Type** – The type of time to show the user. Options include Time Entry Based, Counter Based, and Accrual Based.
- **Time Type** – The category of the time to show the user. Options include Calculated, Raw, and Pay Category.
- **Period** – The period of time to show the user. Options include Pay Period and Weekly.
- **Sticky Note** – Allows users to add notes for quick reference. Up to 10 notes can be added and the color of each note can be edited.
- **Turtles** – A fun widget where users can feed their turtles by clicking in the background to add food and keep them going. Configuration of the turtles is available where users can change the number of turtles (up to 5) and the background color (4 options), as well as the ability to show or hide the widget.
- **My Applicant Profile** – This widget works with the New Applicant Portal and is part of the HR Recruitment module. This widget cannot be used with the Mobile App and is only accessible from a browser, although a browser from a mobile device can be used. Applicants will get the Default New UI Dashboard Profile that is created by default when the New UI is enabled for a company, enabling them to create applicant profiles and apply for jobs. You can find more details about how to use this functionality in the Recruitment/Talent Acquisition User Guide.

- **My Mailbox** - Users can view and take actions on the *My To Do Items* page from within the *My Mailbox* New UI Dashboard widget. The *My Mailbox* title is linked to the *My To Do Items/Notifications/Checklists* screen. Users can select one, several, or all To Do Items **of the same type** for a mass action (*Approve/Reject*).
- Users can view the *My Checklists* page and take actions within it from the *My Mailbox* widget. Tabs for *My To Do Items* and *My Checklists* are available, and if the *My Checklists* view is shown, clicking on the *My Mailbox* title displays the *My Checklists* tab. When no Checklists are available, a *No data to display* message appears.
- **My Saved Reports** - Users can view the *My Saved Reports* report in the New UI Dashboard as a widget when it is included in the New UI Dashboard Layout. The title, labeled **My Saved Reports**, provides a link that redirects users to *My Info > My Reports > My Saved Reports*. Users are able to share views as in a regular report. Saved report views from the *My Saved Reports* report are not available in the widget, and saved views from the widget are not available in the *My Saved Reports* report.

New Dashboard Tiles for Widgets

Default tiles appear in the New UI Dashboard Layout Configuration in *Company Settings > Profiles/Policies > New UI Dashboard Layout > Edit*. If a tile requires configuration in a layout profile (for example, Time Statistics), **Configure** and **Remove** buttons are displayed.

When a user clicks on **Configure**, a dialog box opens for widget configuration. If a user clicks **Remove**, the widget is removed from the display and the space is filled by other tiles.

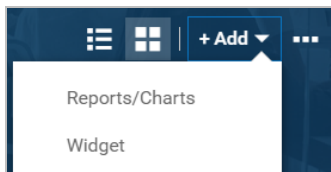
If a tile requires configuration on the Landing Page (for example, Employee Perspectives, Sticky Notes), the **Remove** button only displays in the Dashboard Layout Profile and is hidden under the ellipsis on the Landing Page of end users. The **Configure** button appears on the Landing Page tile if it has never been configured.

If a tile does not require configuration (for example: Clock, Announcements), the **Remove** button only displays in the layout profile and is hidden under the ellipsis on the Landing Page.

Adding Reports/Charts in the New Dashboard Layout Configuration

Administrators can add *Reports/Charts* in the New Dashboard Layout configuration using the option to add tiles (+Add button) at the top of the Layout configuration screen. The user is shown a drop-down menu with the following options:

- Widget
- Reports/Charts



When a user selects *Reports/Charts* in the drop-down, the *Add New Reports/Charts* pop-up appears, which allows a user to search for or select from a list of reports to add.

Modifying the New Dashboard Layout Configuration

Administrators can allow users to modify their New Dashboard Layout configuration when they have permissions to View/Edit the New UI Dashboard Layout Profile.

Configuration options are available to designate that the **User Can Modify** their dashboard. When enabled, the employee/manager has the following actions:

- **Edit Tabs** option on the landing dashboard.
- **Add/Remove Widgets and Reports/Charts**.
- Edit widget configuration.

If a schedule period is changing and a previous schedule allowed users to modify but the new schedule does not, the **Edit Tabs** and **Add/Remove** options are no longer available to users when the schedule changes. Similarly, the same holds true if a profile is changed and users could previously modify and no longer can.

Custom and Domain Tabs

Users with security permissions to Edit the Dashboard can edit Custom and Domain tabs on the Landing Page. Users can toggle between Custom and Domain tabs.

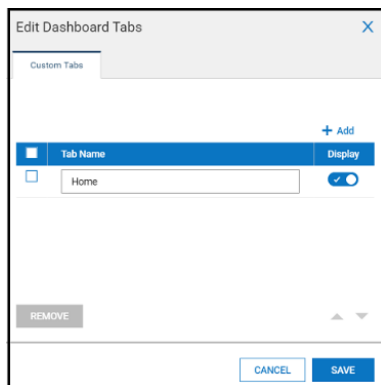
On Custom Tabs, users can:

- Add, Rearrange, Hide/Display, Rename, and Remove tabs.
- Save tab configurations.
- Choose Hide, which saves tab configurations.

If the user deletes Custom tabs, the last tab left remains the only tab in the Custom tabs list. Users cannot delete the last Custom tab in the Edit Dashboard Tabs pop-up. *Button Remove* on the Custom tab is disabled if the user applies the only Custom tab left in the Custom tab list or all custom tabs in the Custom tab list.

On Domain Tabs:

- Users can Rearrange, Hide/Display tabs, and Save tab configurations.
- Users can choose Hide, which saves tab configurations.
- Users cannot Rename or Remove tabs.
- If the user is on a Domain tab and does not specify a tab name, the view is switched back to Custom tabs and an error message appears.
- If the **Show My Dashboard** checkbox is not applied in the *Dashboards Visibility* section of the New UI Dashboard profile, the *My Dashboard* tab does not display in the Domain tabs list.
- If the **Show Domain Dashboards** checkbox is not applied in the *Dashboards Visibility* section of the New UI Dashboard profile, the *Domain Tabs* tab does not appear.
- If the **Show My Dashboard** and **Show Domain Dashboards** checkboxes are disabled in the New UI Dashboard profile, the *Domain Tabs* tab does not display on the *Edit Dashboards Tabs* pop-up. The *Edit [Dashboard] Tabs* pop-up contains only Custom Tabs.
- If the **Show Custom Dashboards** checkbox is not applied in the New UI Dashboard profile, the *Custom Tabs* tab does not appear.
- If the **Show My Dashboard**, **Show Domain Dashboards**, and **Show Custom Dashboards** checkboxes are disabled, the *Edit Tabs* option does not display on the Landing page.



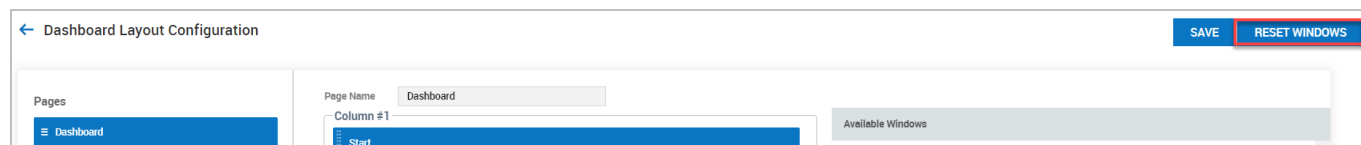
Save and Reset Windows

The *Save* and *Reset Layout* buttons are available when a user makes changes on the Dashboard Configuration page. Also, when a user applies the *View Mode* buttons on the Configuration page (**List** view or **Grid** view) and the *View Mode* is changed, the *Save* and *Reset Windows* options are enabled to save or reset the applied View Mode.



Reset Windows Widget Configurations

Administrators can reset My Windows to the last saved state in the New Dashboard Layout Configurations when they have permissions to View/Edit the New UI Dashboard Layout Profiles (*Company Settings > Profiles/Policies > New UI Dashboard Layout, View/Edit New UI Dashboard Layout Profile, Edit in the Schedule widget*). Selecting the **Reset Windows** option resets the entire configuration to the last saved state, including the widget configuration.



The screenshot shows the 'Dashboard Layout Configuration' interface. At the top right, there are two buttons: 'SAVE' and 'RESET WINDOWS'. The 'RESET WINDOWS' button is highlighted with a red rectangular box. Below the buttons, there is a section for 'Pages' with a 'Dashboard' tab selected. To the right, there is a 'Page Name' field with 'Dashboard' entered, and a 'Column #1' field with 'Start' entered. Further right, there is an 'Available Windows' section.

The Reset Windows option is a page level action, and a reset impacts the entire configuration.

Assigning New UI Dashboard Layout Profiles

Assigning Profiles

Users (Managers, Admins) with permissions to view employees and assign the New Dashboard Profile where the employee has the first screen set to the New Dashboard Profile can assign the New Dashboard Layout Profile to their employees.

The profiles must be assigned to employees in their employee accounts to make them available in the application. The profiles are effective dated so that you can schedule dashboards to become effective as of a specified date. Any employee assigned to the profile will be subject to the dates specified. The profiles can be assigned en masse through *Company Settings > Mass Edit > Mass Edit Profiles*.

Leave of Absence	Medical Leave			
New UI Dashboard Layout	Manager New UI Dashboard		12/31/1900	+
Pay Calculations*	Salaried		12/31/1900	+

When changes are made to the New Dashboard Profile for the current layout schedule, the employee dashboard remains as is. Administrators can create a new schedule to reset a user's layout. If multiple schedules exist within a profile and the current layout is deleted, the previous Dashboard Layout is shown to the employee. The Custom tabs are removed.

NOTE: A Home tab is created by default when a new schedule has been assigned. When an Administrator creates a new schedule and assigns a Dashboard Layout Profile with the schedule to employees, the system creates a Home tab for users and reproduces the same layout from the previous schedule.

Updating the New UI Dashboard Layout Assignment

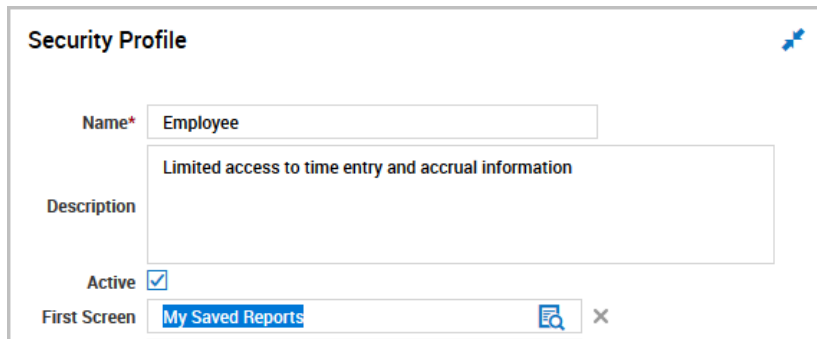
Administrators can update New UI Dashboard Layout assignments when they have the appropriate permissions to View employees and assign a New Dashboard Profile. Employees should have their first screen set to the New UI Dashboard (Home).

Any assignment/re-assignment of a New UI Dashboard Layout Configuration Profile applies a new Dashboard Layout to the user, and the new layout is applied according to its Effective Date.

Security Permissions

Security Profile Settings

Within the **Security Profile** widget of security profiles, there is a **First Screen** option that defines the first screen for all users assigned to that security profile. When **[Security Profile Default]** is selected as the **First Screen** in the employee's **Account Information** widget on the Employee Information page, the **First Screen** default from the security profile determines what is displayed for that employee. In the example below, the **My Saved Reports** page would be displayed.



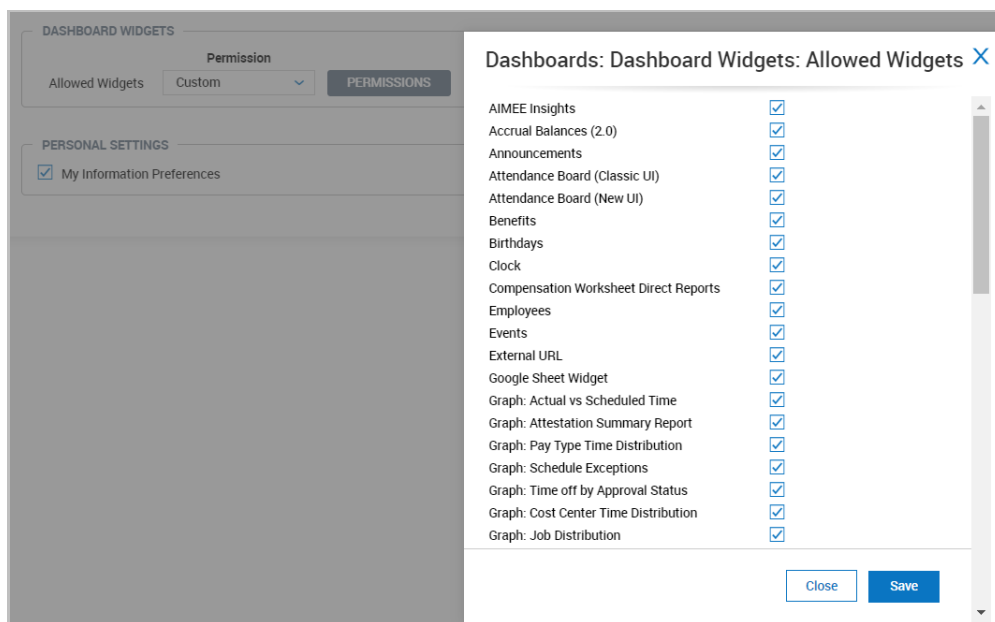
The screenshot shows a 'Security Profile' configuration window. It includes a 'Name' field with the value 'Employee', a 'Description' field with the text 'Limited access to time entry and accrual information', an 'Active' checkbox that is checked, and a 'First Screen' dropdown menu currently set to 'My Saved Reports'. There is also a search icon and a close button (X) next to the dropdown.

The Dashboard Security Items can be found on the *Dashboards* section in Security Profiles.

- A section for *Dashboard Widgets* exists.
- The *Allowed Widgets* can be seen within *Dashboard Widgets* section.
- The *Allowed Widgets* Permissions (Custom) provides the ability to define access to individual Dashboard Widgets.
- The *Module Dashboards* section is available for sub-systems.

Allowed Widget Permissions

Administrators can use the *Allowed Widgets* security item to control users' access to Dashboard widgets. The *Permissions* for the *Allowed Widgets* item within the *Dashboard Widgets* section on the *Dashboards* tab of the security profile can be set to *Custom*, allowing users to define access to individual widgets.



The screenshot shows a 'Dashboards: Dashboard Widgets: Allowed Widgets' configuration window. On the left, there are tabs for 'Allowed Widgets' and 'PERMISSIONS', with 'PERMISSIONS' currently selected. Below these is a 'PERSONAL SETTINGS' section with a checked box for 'My Information Preferences'. The main area displays a list of dashboard widgets with checkboxes indicating their permission status. All checkboxes are currently checked. At the bottom right, there are 'Close' and 'Save' buttons.

Widget Name	Permission Status
AIMEE Insights	✓
Accrual Balances (2.0)	✓
Announcements	✓
Attendance Board (Classic UI)	✓
Attendance Board (New UI)	✓
Benefits	✓
Birthdays	✓
Clock	✓
Compensation Worksheet Direct Reports	✓
Employees	✓
Events	✓
External URL	✓
Google Sheet Widget	✓
Graph: Actual vs Scheduled Time	✓
Graph: Attestation Summary Report	✓
Graph: Pay Type Time Distribution	✓
Graph: Schedule Exceptions	✓
Graph: Time off by Approval Status	✓
Graph: Cost Center Time Distribution	✓
Graph: Job Distribution	✓

Migrated Allowed Widgets Permissions for New Widgets

Allowed Widgets permissions have been migrated for new widgets so that all users inherit appropriate permissions for widgets they had access to in the Classic dashboard experience. Correct values are created for the following widgets:

- My Schedules and Time Off widget
- My Mailbox widget
- Missing Punches widget

If users had the Classic UI checkbox enabled in their security profile, the New UI option's checkbox is automatically enabled for them.

Using Charts in Dashboards

My Dashboard & Domain Dashboards

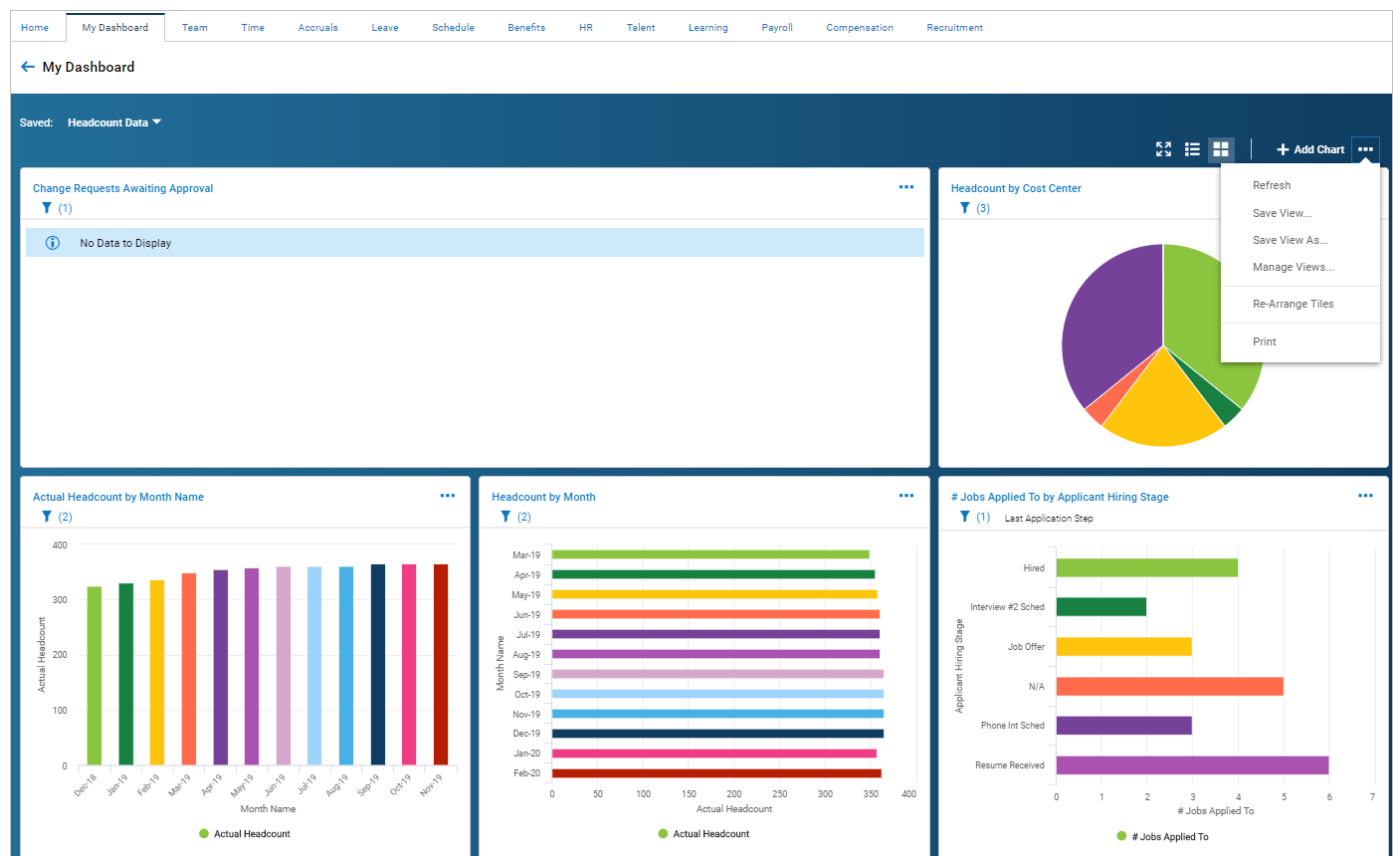
The ability to create charts for reports allows for compelling at-a-glance visuals of your data. Providing the ability to use those charts from a variety of reports on a home screen, dashboards bring important information to users.

With proper permission, users can customize their own dashboard experience directly from their home screen, under the My Dashboard tab. Domain Dashboards under the *Team* menu can also be customized.

About My Dashboards

When charts are added to dashboards, the title to each chart serves as a hyperlink which, when clicked, will send you to the report view it is sourced from. Also, in a similar way, charts are used inside reports; each data point (*for example: single bar in a bar chart, single point in a line chart*) can be clicked which will send you to the filtered report based on the selection.

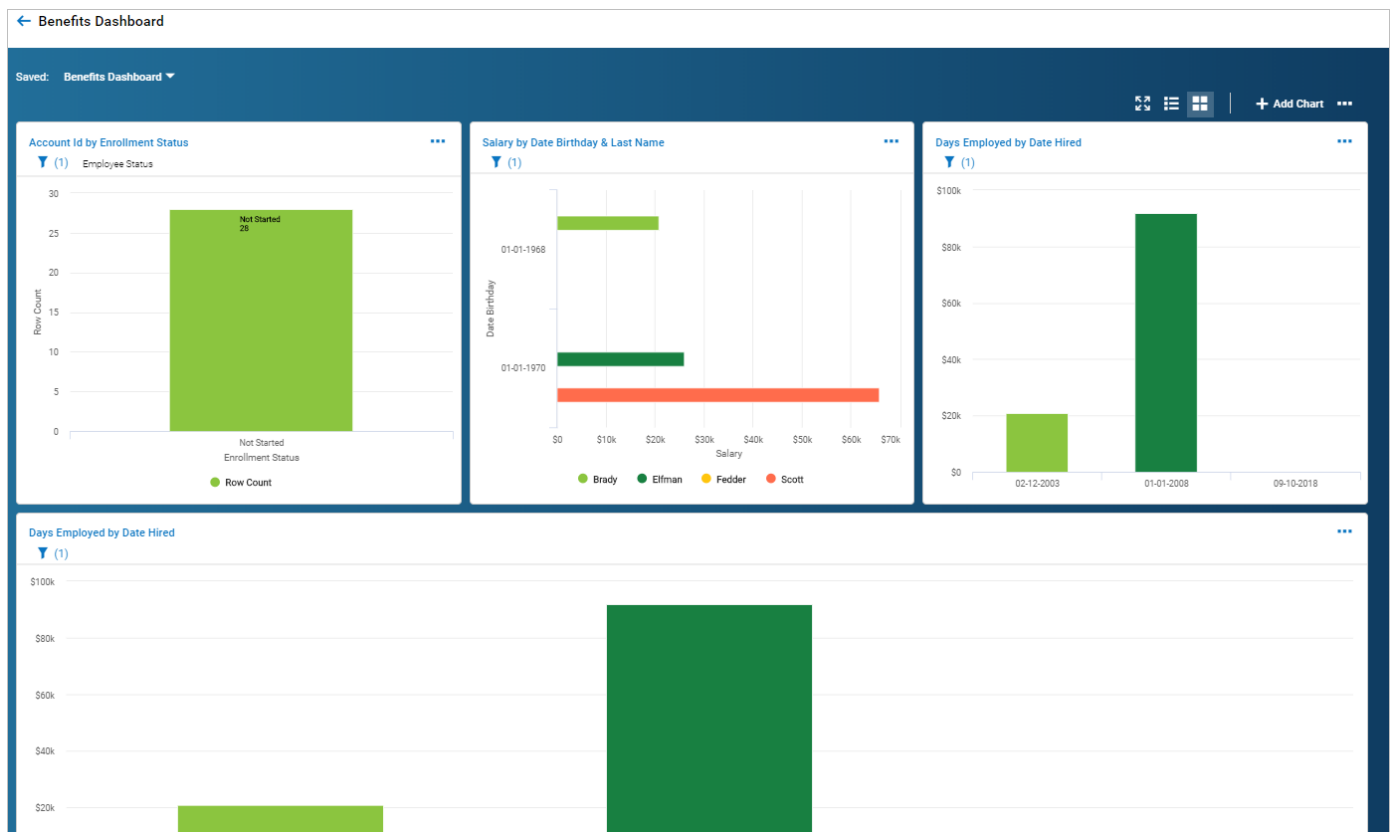
There is a maximum limit of 6 charts per single dashboard. When a dashboard has 6 charts added and the maximum number of charts is reached, the *Add Chart* text remains on the page in a disabled state. When users click on it, information displays explaining how to proceed.



About Domain Dashboards

For more targeted visuals for specific modules, we offer the ability for users to customize dashboards that are available in each product.

These dashboards are specific to the Domain/module you are using. When building the *Time* dashboard, you will only be able to bring in charts from *Time*. In the *Benefits* dashboard, you will only be able to bring in charts from *Benefits*. Under each main menu item in the *Team* menu, the *Dashboard* option will be available to define these dashboards.



Adding Charts to Dashboards

Adding charts to dashboards is essentially the same process, whether adding them for *My Dashboard* or adding them to Domain dashboards.

- Click the *Add Chart* button featured in the middle of the empty chart frame or click the *+Add Chart* link. An *Add Chart* side panel will open which allows you to select a report (report list will be based on security permissions.)
- If a selected report has no charts associated with it, the panel will indicate this. You should select a different report that does have charts or exit and create some charts for the desired report.
- Once you select a report, you will be prompted to select a *Report Setting*, as there may be several saved views of the report. Once a setting is selected, a list of charts will appear in the list below.
- Select the desired charts and click *Add* to bring it into the dashboard. Repeat these steps to add charts from other reports.

Add Chart

Please note: Max of 6 charts allowed to be displayed per dashboard

Select Report

Reports *

Benefit Census Report

Select Report Setting

Report Setting *

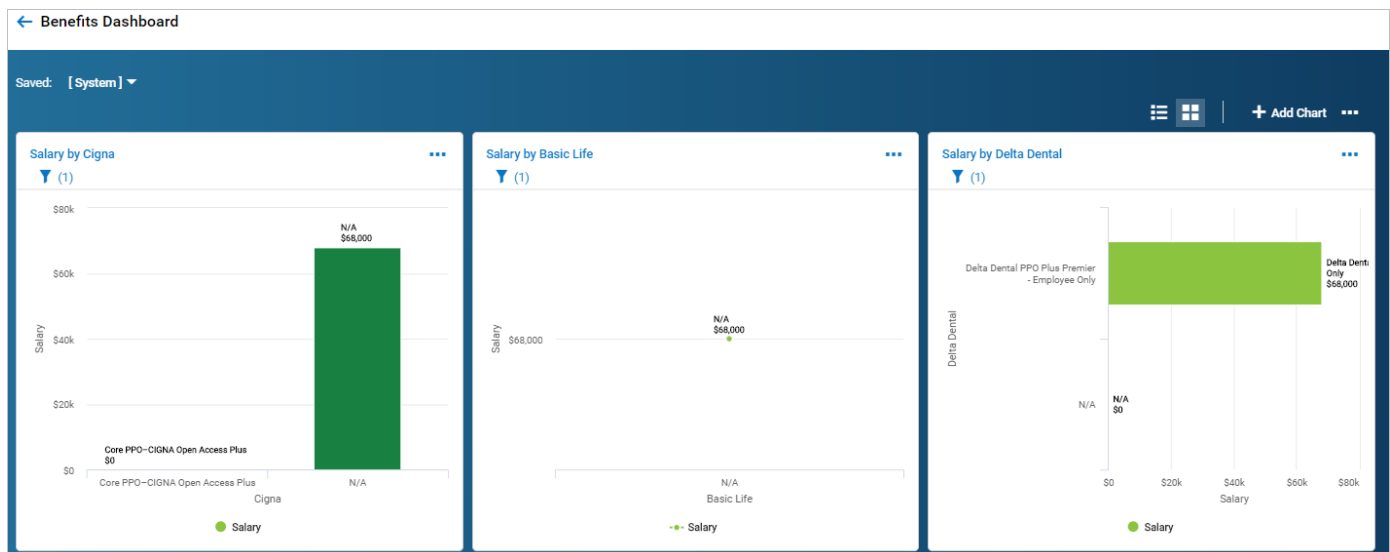
[System]

My Charts

☒ Salary by Cigna

☐ Salary by Basic Life

☐ Salary by Delta Dental



Each chart in the dashboard can be filtered on date and column parameters (just as the report for which it is based).

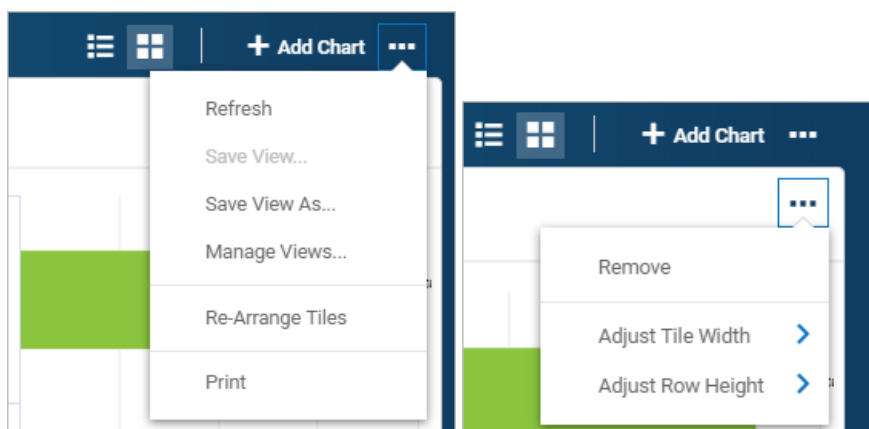
The filter for each dashboard chart acts independently of the report chart. In other words, if the default report date range for my chart is **this month**, and then the filter for the same chart is changed to **this week**, this filter will “stick” to the dashboard chart and will not affect the report chart.

Dashboard Options

Under the Actions ellipses icon, there are options for customizing and saving views of charts. A view is a set of charts, in a specified order, that can be designated as the default and/or shared with other users. You can refresh the data in the view (Refresh), save a view (Save View), save the view with a new name (Save View As), delete a view, set it as the default view or share it (Manage Views), re-arrange the order of the charts within a view (Re-Arrange Tiles), or print the view (Print).

NOTE: Users can Refresh the data in a Dashboard via the Action menu, much like the option to refresh data in Reports.

Within each chart in a dashboard, you have the option to remove the chart (Remove), adjust the width of the chart (Adjust Tile Width), or to adjust the tile height (Adjust Row Height).



Showing Chart Tiles as Reports on Dashboard Tiles

Users can switch between Report and Chart views on a Dashboard tile when they have the appropriate permissions to View/Edit the Report and/or Chart tile(s). Users are able to view one Chart at a time, and they can toggle between more than one Chart if needed.

The View mode is retained when a user switches the tile from the Chart view to the data/Report view and logs out. When the user logs back in, the view remains as data/report. Report filters are only retained if a report is saved.

NOTE: When at least one tile is added to any Domain Dashboard in Chart Mode, the appropriate filters are applied and the number of filters displays just next to the Filter icon.

When at least one tile is added to any Dashboard in Chart Mode, users can open the Dashboard, click on a segment of the chart and it is filtered on the Dashboard. The undo option then appears, and the applied filters can be cleared by clicking the *Undo This Change* link.

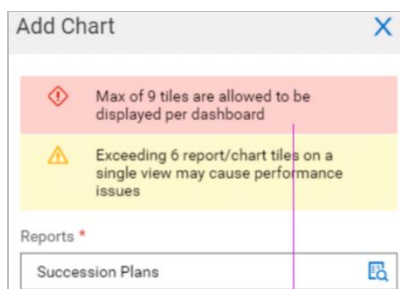
Report/Chart Tiles Maximum on a Dashboard

A warning message about exceeding six Report/Chart tiles on a Dashboard Layout Configuration page displays for users with permissions to View/Edit the New UI Dashboard Layout Profile.

On the Home tab and the Domain tabs, when a user adds a Chart to their Dashboard:

- If the combined total of Report/Chart tiles added to the Dashboard and selected on the Add Report/Chart screen is less than 6, an informational message appears indicating the maximum tiles allowed per Dashboard.
- If the combined total of Report/Chart tiles added to the Dashboard and selected on the Add Report/Chart screen is greater than or equal to 6, a warning message appears explaining that exceeding 6 Report/Chart tiles on a single view may cause performance issues.
- If the combined total of tiles added to the Dashboard and selected tiles is greater than the maximum, the *Save* button is disabled and an error message explains the maximum number of tiles allowed to be displayed per Dashboard.

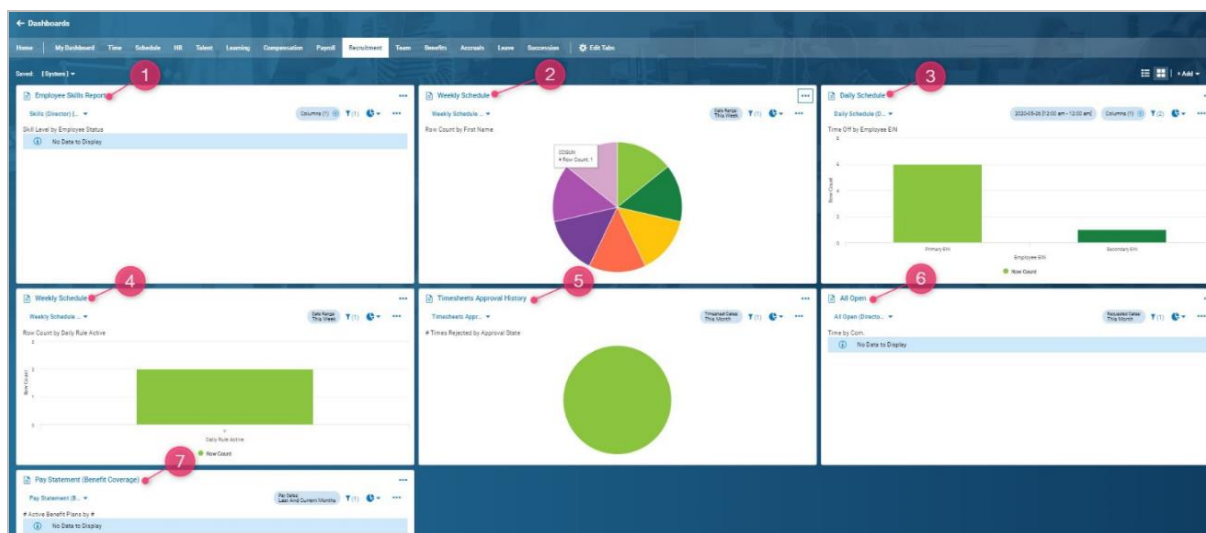
When the tiles are more than 6 and less than the maximum or when the limit is reached, a warning message displays above the informational message.



Adding Charts from Reports to the Dashboard

Users can add charts to the Dashboard from a saved view of reports. Users with the appropriate security permissions can add charts such as those listed below from the Landing and Domain dashboards in the Hamburger menu.

- Skills
- Weekly Schedule
- Daily Schedule
- Weekly Schedule (by Daily Rule)
- Timesheet Approval History
- All Open Time Off
- Pay Statement (Benefit Coverage)



Users can add Reports/Charts to the Landing and Domain Dashboard Layouts. Users can see the option to add tiles at the top of the Dashboard Layout. When the user clicks on the **+Add** button, a drop-down with the following options opens:

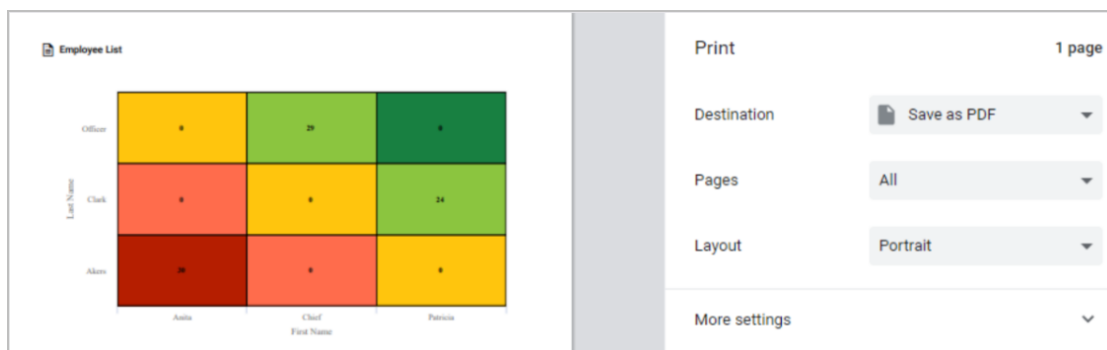
- Reports/Charts
- Widget

When the user selects the *Reports/Charts* drop-down, an *Add Reports/Charts* pop-up appears and allows the user to search for and/or select from a list of Charts.

Printing Charts from the New UI Dashboard Layout

Administrators can print information from a New UI Dashboard Layout.

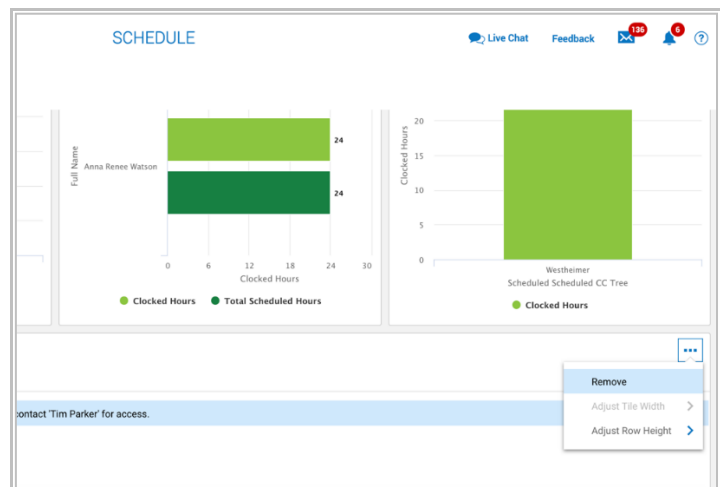
- Only charts can be printed from the New Dashboard Layout. The Charts preview mode is defined by the user via the *Re-arrange Tiles* side panel. The chart name displays for each chart.
- Two charts can be printed on the same sheet if *Portrait* orientation is selected when the **A4** or **Letter** paper format is set up.
- If a *No Data to Display* warning message appears on the chart tile, the chart is not printed.



Dashboard Views

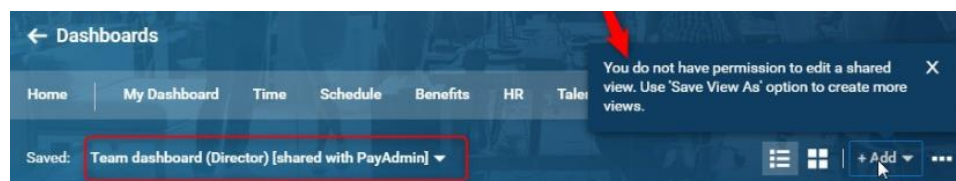
Since the owner of a dashboard view is the only person who can edit that view, it will be read-only for every other user the view is shared with. For a user who is accessing a shared view and does not have access to certain charts, who also wants to manipulate the view to a degree (for example, remove said charts and add new), these are the steps they can take:

- In the Dashboard View, click the Action menu and select *Save View As...*
- Give the view a name and click *Save*.
- Once in the new view, users can remove unwanted chart frames by clicking the *Action* menu and selecting *Remove* in each individual frame. New charts can then be added by the user.



When a view is shared, users who either do not have access to the reports or who do not have access to the particular view of a report used see empty spaces. The blank spaces include information about why the blank spaces appear, as well as who to contact to enable access, remove the blank spaces from their dashboards and replace those charts with more useful information.

When a Dashboard is shared with another user via the *Share with Others* option, the **+Add** button is disabled for other users and a tooltip is provided that explains *You do not have permission to edit a shared view. Use 'Save View As' option to create more views.*



Sharing Dashboards

Since the owner of a dashboard is the only person who can edit that view, it will be read-only for every other user the view is shared with. For a user who is accessing a shared view and does not have access to certain charts, who also wants to manipulate the view to a degree (for example, remove charts and add new), these are the steps they need to take:

- In the dashboard view, click the actions ellipses icon and select *Save View As...*
- Give this view a new name and *Save*
- Once in the new view, these users can remove unwanted chart frames by clicking the actions ellipses icon and selecting *Remove* in each individual frame. New charts can then be added by the user.

When a view is shared, users who either do not have access to the reports or who do not have access to the particular view of a report information explaining the user does not have access to that report will display and will list the contact person to seek for permission.

Adjusting Width and Height of Dashboard Tiles

The height and width of dashboard tiles can be adjusted. Under the actions ellipses icon of each tile are the options of *Adjust Tile Width* and *Adjust Row Height*. After selecting one of the options, a *Grow* or *Shrink* option will display, allowing you to resize the tiles.

Adjust Tile Width

- The *Grow* option will expand the tile to the full width of the screen and wrap/move adjacent tiles to the row below.
- The *Shrink* option will restore the tile to its original position and other tiles to their original positions.

Adjust Row Height

- The *Grow* option will act as a zoom feature and create more space between data rows and columns. This option can be used multiple times to zoom in further and make your tile taller. With each use, the system will increment the growth.
- The *Shrink* option will restore the tile to its original size. If the *Grow* option has been used multiple times to expand the height of the tile, the *Shrink* option will incrementally step down the size of the tile. Using it once will not restore it to its original size if the *Grow* option was also used multiple times.

Addendum

Charts for Succession Planning

For companies utilizing Succession Planning, users can build charts using the Succession Planning report and focus on a particular Succession Profile. This makes it possible to have multiple charts using multiple profiles in the same report view. These charts and graphs are available for inclusion in the Succession Planning Dashboard, and the charts support all metrics for Succession Planning.

Succession Charts Tooltips

The data provided inside Succession Charts is accessible so that users can easily see the data and values that are of importance. Hovering over a Line chart for Succession Planning shows data in a dark grey color so it can be viewed clearly.

When creating a Metric History or Employee History Line chart, a tooltip appears when users hover over various points in the chart itself which shows:

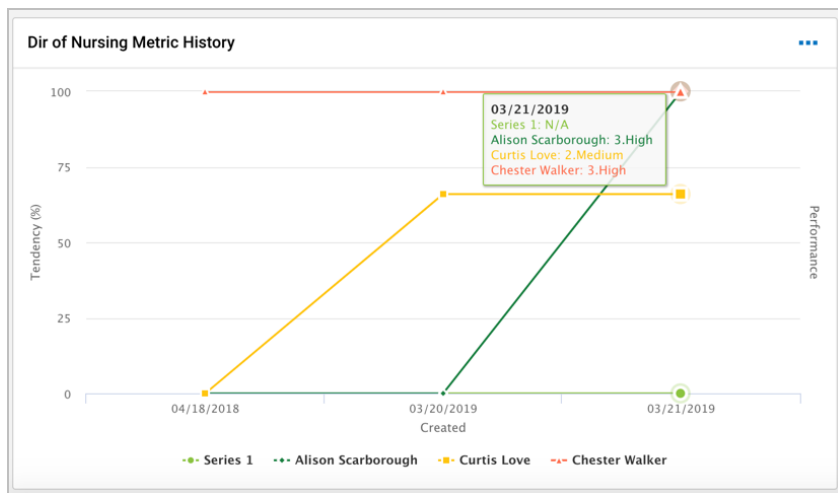
- The name of the employee
- The status of given metric

The text color for the tooltip matches the line colors used in the chart, and the text displays in a dark grey color.



Metric History Graph

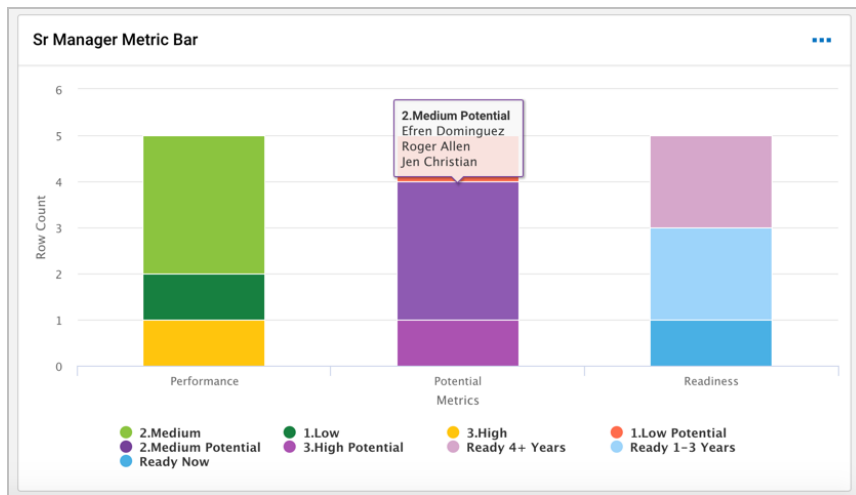
This is the line chart for metric history. When the chart is presented there are details provided, such as the status, when the user hovers over the chart area.



Metric Bar Chart

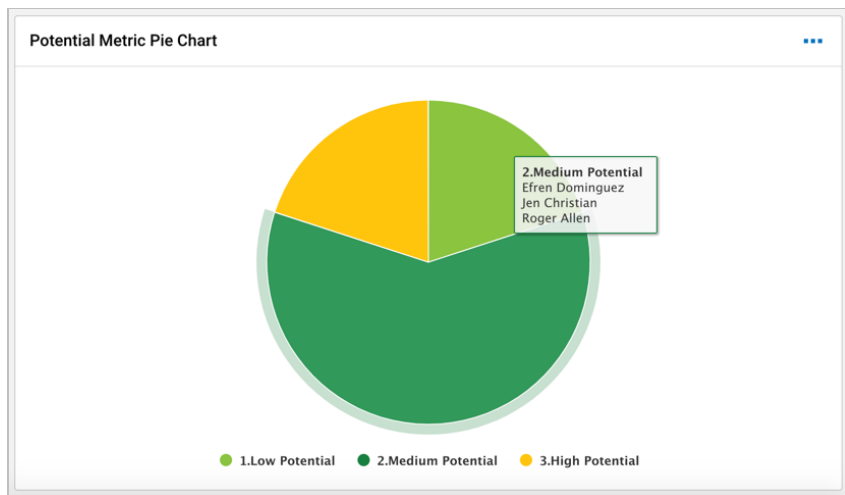
This is the horizontal bar chart that displays the level of Succession Profile metrics for an employee or group of employees. When the chart is presented, the user can perform certain interactions such as:

- Switching between a grouped or stacked view.
- Clicking inside the chart, which sends the user to the Successions Plan page (when on the Succession dashboard).



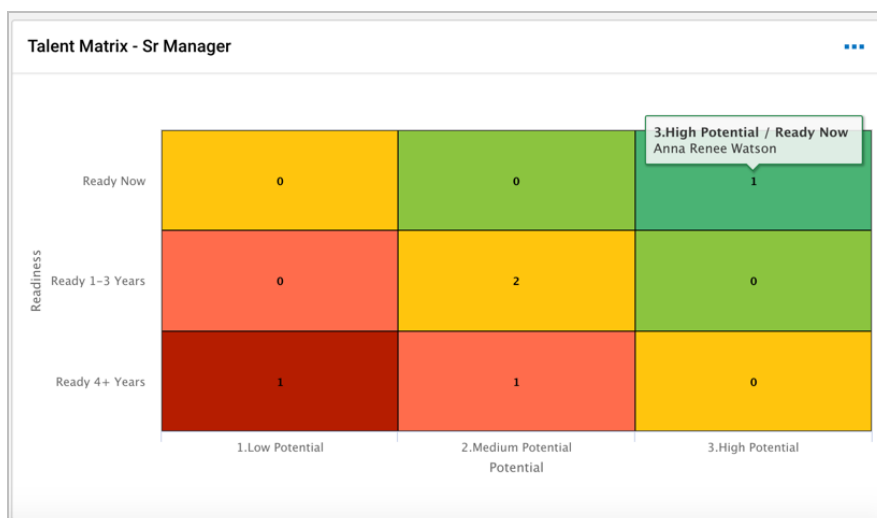
Metric Pie Chart

This is the pie chart that displays the level of Succession Profile metrics for an employee or group of employees.



Talent Matrix Chart

This is the heat map chart for Talent Matrix. Users can hover over each box to view the employee name(s) associated along with the status.



Users can add a Succession Chart by updating the mode to *Charts and Data* or just *Charts*, which in turn provides the option to *Add Chart*. This opens a side panel allowing the user to choose a specific Chart Type. The same chart type options as standard charts are available; however, these chart types are linked to certain Succession options.

Importing Dashboard Content

Users now have an option to import/copy dashboard content from the Classic version to the latest New UI Dashboard version. The **Copy Tabs from Classic UI** option appears within the *Edit Dashboard Tabs* screen (*Edit Tabs* functionality on the Landing Dashboard).

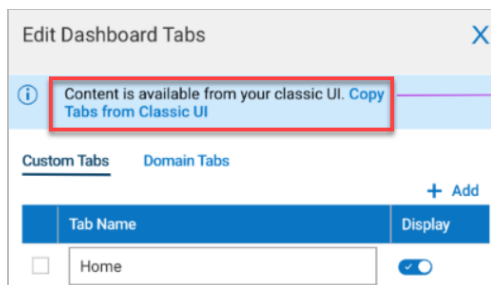
Supported widgets are indicated on the screen before the import so users know what result to expect. Widget configuration is included in the import to the New UI Dashboard and maintained on the Classic UI after the import.

A *Not all widgets are available for copying yet* informational message displays if not all widgets have been converted from the Classic Dashboard to the New UI Dashboard. The following widgets are now available on the New UI Dashboard version:

- Announcements
- Start
- Accrual Balances
- Sticky Notes
- Turtles
- Recruitment
- My Saved Reports

The following buttons are available in the *Copy Tabs From Classic UI* pop up:

- Cancel button – Used to cancel changes made by the user.
- Copy button – Used to copy tabs and available widgets from the Classic version to the New UI Dashboard.



If widgets and tabs have been migrated successfully, a success message displays. If something failed during the migration, an Internal System Error message displays.

The Tab checkbox is disabled when under the tab there are only (Classic) widgets that are not in the most up to date version of the New UI Dashboard. The Widget checkbox inside the tab is disabled if the widget is not configured for the latest version (still in Classic.) If there are no widgets under the tab, the system displays the *No Data To Display* message.