

PaycoHCM Tips and Tricks: Creating a Report

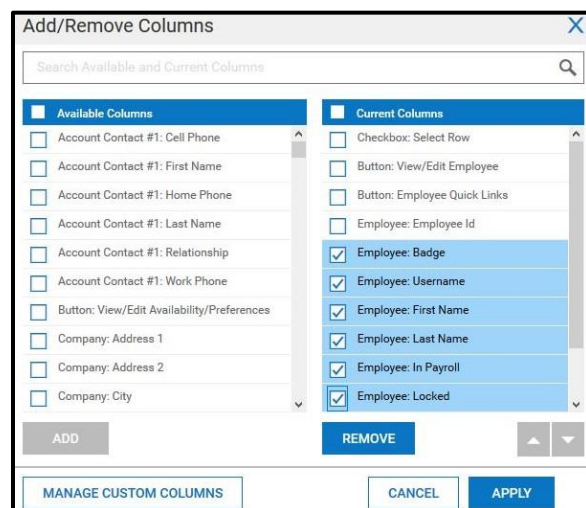
Example: Let's say that you want to create a report that shows the Employee Name (Last, First format), Employee ID, Date Hired, and Status. The report should be called "Employee Hire Dates", and you also want to be able to view this for employees who are terminated or on leave.

Start from the Employee Information Screen (Teams > My Team > Employee Information):

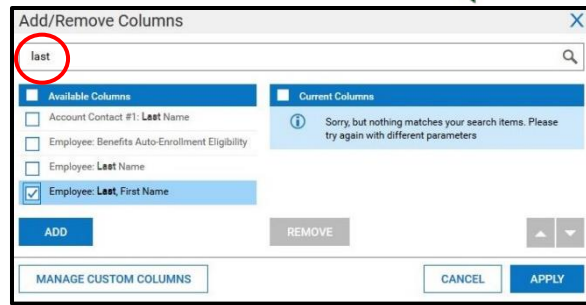
Click on the ellipsis icon at the right of the screen and choose *Add/Remove Columns*.



Start by removing the unwanted columns that are already in the report (right-side column). Check the selector boxes next to the unwanted columns and click **Remove**.

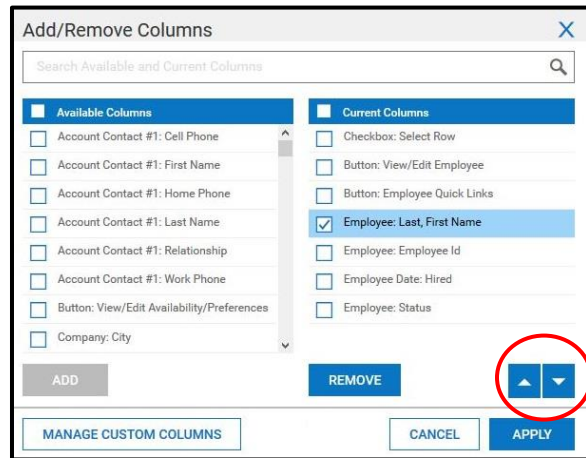


To add the columns you want, either scroll through or begin typing a description of the column in the Search field. This will return a list of matches. Check the selector box next to the column and click **Add**.

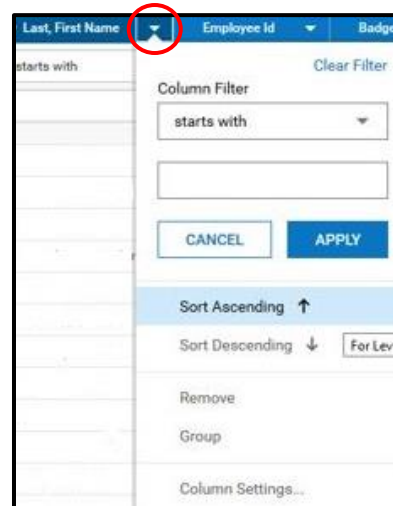


Newly added columns will appear at the bottom of the list. To move the columns into the order you want, check the selector box next to the column and use the up/down arrows to position the column.

Once the columns are selected and ordered, click **Apply** to return to the report.

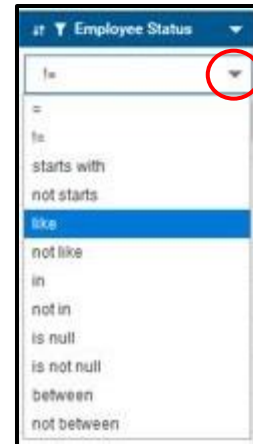


To sort by a column, click on the arrow to the right of the field, and select your sort order.

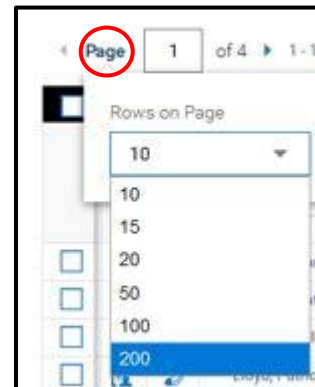


To filter by a column, click on the drop-down arrow in the filter type field and choose your parameter.

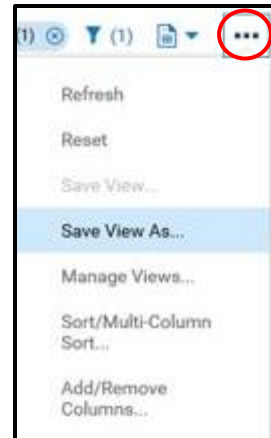
Type the criteria in the filter field.
Pressing the <Enter> key will apply the filter to the report.



By default, most reports will show 10 rows per page. To add rows, click **Page** in the top left corner and use the drop-down to choose the number of rows that you wish to have displayed.



Just like in a document or spreadsheet, you need to save your changes. click on the ellipsis icon at the right of the screen, and choose **Save View As**.



Give the view a name and click **Save**. (Check **My Default** only if you want it to show up this way whenever you access the report.)

The report “Employee Hire Dates” will now be available to you under **My Saved Reports**.

A screenshot of the 'Save View As' dialog box. The dialog has a title bar with 'Save View As' and a close button (X). It contains the following fields and options:

- Name *: A text input field containing 'Employee Hire Dates'.
- Description: An empty text input field.
- Tag: An empty text input field.
- Deletion Is Not Allowed
- My Default
- Share

At the bottom, there are three buttons: 'CANCEL', 'SAVE', and 'SAVE & RUN'.