PaycoHCM Tips and Tricks: Filtering a Report

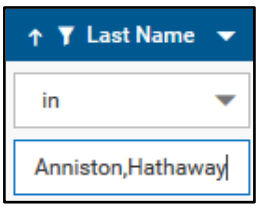
With PaycoHCM, every screen is a report, and quick access to the information you need is right at your fingertips!

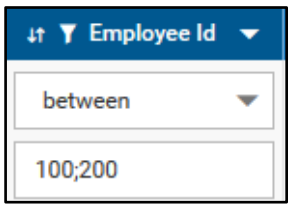
There are three ways to filter a report; by column, by employee/group, or using a custom filter.

Filtering by Column:

1. Under the name of the column, click on the drop-down in the *Filter Condition* field and select the appropriate condition.
   <u>Note</u>:
   - If using ***in*** or ***not in***, separate criteria values with a comma.
   - If using ***between*** or ***not between***, separate criteria values with a semi-colon.

2. Type the filter criteria in the *Criteria* field. Press <Enter> to apply the criteria.

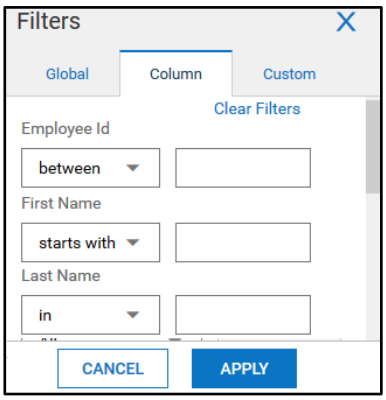




Repeat for any additional columns to be filtered.

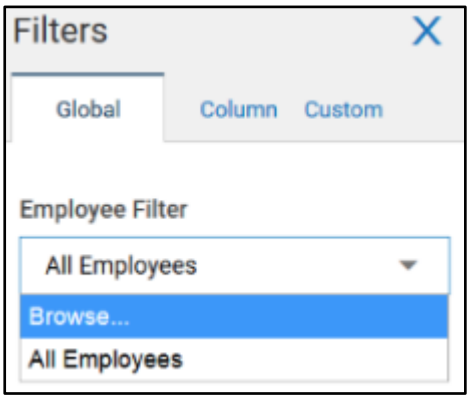
An alternate method for filtering by column is to click on the filter icon to open the *Filters* function.

Select the **Column** tab. Enter the appropriate conditions and criteria and click **APPLY**.

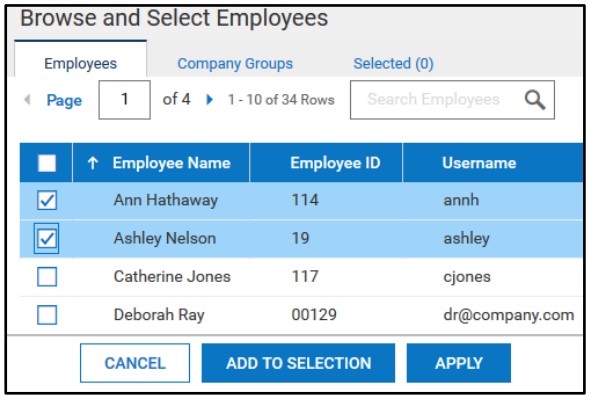


Filtering by Employee or Group

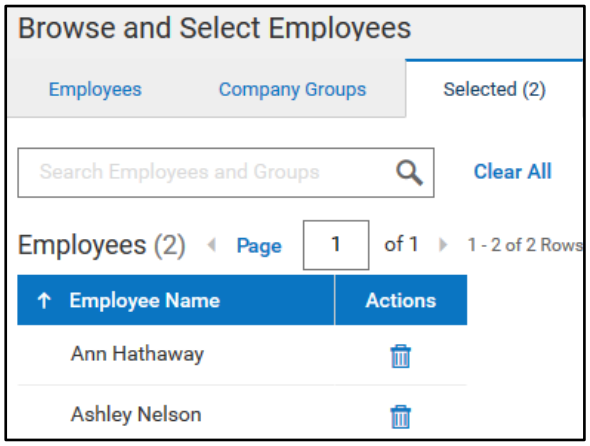
1. Click on the filter icon to open the *Filters* function and select the **Global** tab. Under Employee Filter, select **Browse**.



2. Depending on the filtering criteria, select the **Employees** or **Company Groups** tab. Check the boxes next to employees/groups to be added and click **ADD TO SELECTION**.



3. Click on the **Selected** tab to view or remove the employees or groups that have been added to the filter. Once everything has been added, click **APPLY**.

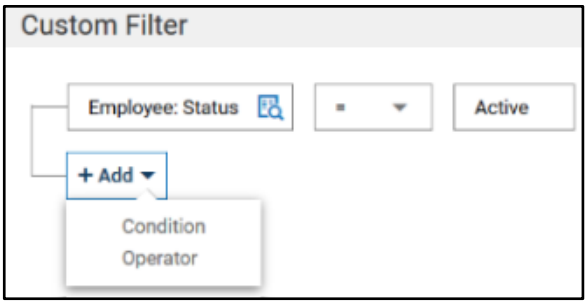


Custom Filters

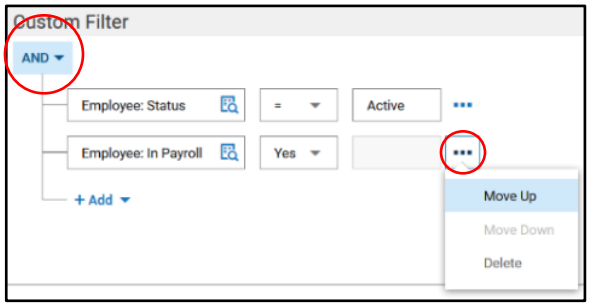
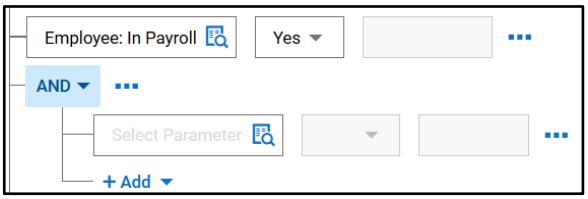
Custom filters can be applied to information that is not displayed as a column in the report, and allow for filtering by multiple conditions.

1. Click on the filter icon to open the *Filters* function and select the **Custom** tab, then click **Add Custom Filter**.

2. Click on the list icon and select the appropriate parameter. Select the appropriate condition, and type in the filter criteria, if applicable.
3. To add another parameter, click **Add** and choose **Condition** or **Operator**.



4. Selecting **Condition** will add another same-level parameter field.
5. Click on the AND field to toggle to OR or NOT.
6. Click on the ellipsis at the end of the field to modify the order of the parameters.



7. Selecting **Operator** will add a dependent parameter field.
8. Once all parameters have been selected, click **APPLY**.