

## **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 **Y** to open the *Filters* function.

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

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🛧 🍸 Last Name 👻	↓† ¥ Employee Id	•
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Filters			Х
Global	Column	Custon	n
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## Filtering by Employee or Group

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

Filters			Х		
Global	Column	Custom			
Employee Filt	er				
All Employe	ees		•		
Browse					
All Employee	s				

 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.

Browse and Select Employees							
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Pag	e 1	of 4 > 1 - 10 of 34 Rows		Sear	ch Employees	Q	
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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**.

Browse and Select Employees						
Employees	Selected (2)					
Search Employees and Groups Q Clear All Employees (2)  Page 1 of 1  1-2 of 2 Rows						
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## **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.

- Click on the filter icon T to open the *Filters* function and select the **Custom** tab, then click **Add Custom Filter**.
- Click on the list icon and select the appropriate parameter.
   Select the appropriate condition, and type in the filter criteria, if applicable.
- 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**.

Global Column	Custom
+ Add Custom Filt	ter

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Pustom Filter							
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							Move Down
							Delete

- Employ	ee: In Payroll 🔀 Yes 🔻	
AND 🔻		
	Select Parameter	