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

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

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

HR Report requires at least one of the following roles:

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

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

**Documentation**

**Accessing HR Reports**
There are two ways to access HR Reports:

1. Go to: [https://hrreports.unm.edu](https://hrreports.unm.edu) OR
2. Go to: [https://my.unm.edu](https://my.unm.edu)
3. Click **Staff**
4. Click Details on the Reports card

5. Click HR Reports

6. Log in with your NetID and Password
7. From the list of applications*, click on the **Employee Application**.

*The list of application(s) that is displayed is determined by the approved BAR security role(s) per user.*
Introduction to Interactive Grid
The Interactive Grid (IG) is very similar to current state Interactive Reports (IR). The IG presents users a set of data in a searchable, customizable report. The IG provides several capabilities for changing how the data is displayed. There are new options in the Actions menu and the ability to rearrange report only using the mouse.

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

Interactive Grid Icon:

Interactive Report Icon:
Using the Interactive Grid

**Searching in an Interactive Grid**

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

All rows matching the text **Manager** are displayed. Notice a new filter is created. When the checkbox is checked, the filter is applied. Unchecking the filter will revert to the original data set displayed in the report.
Another way to filter data is to click on the column heading. You can either select the values from the list or type text.

Selecting the Manager Job Title displays the same result as above. Notice the filter criteria is displayed.
Rearrange Columns Using Drag and Drop
Drag and drop a column into place by clicking and holding the drag handle on the column heading. Hover the mouse over the column heading to display the drag handle.

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

Release the mouse to complete moving the column. In this example, the Job Title column was moved after the Hire Date column.
Resizing Columns in an Interactive Grid
Resize the width of a column by clicking and holding the edge of a column heading and adjust with the mouse.

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

To remove the sort, click the toggled button again, now labeled Don’t Sort.
**Column Heading Menu**
The Column Heading Menu contains buttons to sort, break, aggregate, freeze, hide a column, and text filter for searching within a column.

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

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

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

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

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

*Freeze*
Freezes the selected column in place, preventing horizontal scrolling.

*Hide*
Hides the selected column from view.

*Text Filter*
The text filter dynamically limits the list of column contents based on the text string entered into the filter field.
Creating a Control Break in an Interactive Grid
Click on the column heading of the desired control break then click on the Control Break button in the Column Heading Menu.

After clicking the Control Break button, the break is created.
The same process is repeated to include the Org Description in the control break.

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

If you no longer want the control break(s) to display, simply click on the X next to the control break definition.
Creating an Aggregation with the Column Heading Menu

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

The dialog window appears. Click on the + button to define a new aggregation.
Freezing Columns in Place

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

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

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

Notice the grey line after the **Employee** column is removed after clicking the Unfreeze icon.
Hiding Columns in an Interactive Grid

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

The column is no longer visible in the report.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Job Title</th>
<th>Hire Date</th>
<th>Salary</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miller, James</td>
<td>CLERK</td>
<td>01/23/1982</td>
<td>$1,300.00</td>
<td>NEW YORK</td>
</tr>
<tr>
<td>Clark, Lisa</td>
<td>MANAGER</td>
<td>06/09/1981</td>
<td>$2,450.00</td>
<td>NEW YORK</td>
</tr>
<tr>
<td>King, Tom</td>
<td>PRESIDENT</td>
<td>11/17/1981</td>
<td>$5,000.00</td>
<td>NEW YORK</td>
</tr>
<tr>
<td>Ford, Tina</td>
<td>ANALYST</td>
<td>12/03/1981</td>
<td>$3,000.00</td>
<td>DALLAS</td>
</tr>
<tr>
<td>Scott, Katie</td>
<td>ANALYST</td>
<td>12/09/1982</td>
<td>$3,000.00</td>
<td>DALLAS</td>
</tr>
<tr>
<td>Smith, Matt</td>
<td>CLERK</td>
<td>12/17/1981</td>
<td>$800.00</td>
<td>DALLAS</td>
</tr>
<tr>
<td>Adams, Joe</td>
<td>CLERK</td>
<td>01/12/1983</td>
<td>$1,100.00</td>
<td>DALLAS</td>
</tr>
<tr>
<td>Jones, Robert</td>
<td>MANAGER</td>
<td>04/02/1981</td>
<td>$2,975.00</td>
<td>DALLAS</td>
</tr>
</tbody>
</table>
To redisplay hidden columns, click on the **Actions** menus and select **Columns**.

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

The Commission column is displayed on the report.
Filtering with the Column Heading Menu
Filter an interactive grid by the contents of a column by entering keywords in the Search field of the Column Heading menu. For example, click on the Employee column and type lis.

Click on Clark, Lisa and the report is filtered for this employee.
About the Actions Menu in an Interactive Grid

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

**Columns**

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

**Filter**

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

**Data Submenu**

The Data submenu contains the following options:

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

**Format Submenu**

The Format submenu contains the following options:

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

**Chart**

Displays the Chart dialog. Create a chart by selecting a chart type and configuring the required fields.
Report Submenu
The Report submenu contains the following options:

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

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

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

Chart
Displays the Chart dialog. Create a chart by selecting a chart type and configuring the required fields.
Filtering an Interactive Grid

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

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

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

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

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

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

- **Column**: Salary
- **Aggregation**: Average
- **Tooltip**: Average Salary

Check Show Overall Value
Click the **Save** button.
The Average Salary is displayed.

Adding Highlighting to an Interactive Grid
Apply color effects to an interactive grid by selecting Format, then Highlight.
In this example, highlight anyone with a Salary greater than $3,000. Define the following:

Name: **High Salary**
Highlight: **Column** (Only highlights the Salary column instead of entire row).
Column: **Salary**
Background Color: **Yellow**
Text Color: **Red**
Condition Type: **Column**
Column: **Salary**
Operator: **greater than**
Value: **3000**
Click the **Save** button.
Creating a Control Break

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

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

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

The report breaks based on each Org and Org Description.
Using Charts in an Interactive Grid

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

In this example, chart the average salary by creating a Bar chart.
Use the scroll bar to scroll and define by the following:

Orientation: **Vertical**
Label: **Org**
Value: **Salary**
Aggregation: **Average**
Click the **Save** button.

The results chart the average salary per Org. Notice the new icon that appears. These icons allow you to toggle between the new chart and the report data.
Saving Interactive Grids
Reports in interactive grids have varying uses and characteristics. End users interact with the Primary report of an interactive grid and can modify and save changes as a Private report.

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

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

In this example, the Location column is not displayed. To save this change as a private report, go to the Actions menu, then Report, then Save As.
Enter a name to save the report. In this example, **Employee Report Without Location**. Click on the **Save** button.

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

<table>
<thead>
<tr>
<th>Employee</th>
<th>Job Title</th>
<th>Hire Date</th>
<th>Salary</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miller, James</td>
<td>CLERK</td>
<td>01/23/1982</td>
<td>$1,300.00</td>
<td>-</td>
</tr>
<tr>
<td>Clerk, Lisa</td>
<td>MANAGER</td>
<td>05/01/1981</td>
<td>$2,450.00</td>
<td>-</td>
</tr>
<tr>
<td>King, Tom</td>
<td>PRESIDENT</td>
<td>11/01/1981</td>
<td>$5,000.00</td>
<td>-</td>
</tr>
<tr>
<td>Font, Tina</td>
<td>ANALYST</td>
<td>02/03/1981</td>
<td>$3,000.00</td>
<td>-</td>
</tr>
<tr>
<td>Scott, Kate</td>
<td>ANALYST</td>
<td>12/09/1982</td>
<td>$3,000.00</td>
<td>-</td>
</tr>
<tr>
<td>Smith, Matt</td>
<td>CLERK</td>
<td>12/17/1980</td>
<td>$2,000.00</td>
<td>-</td>
</tr>
<tr>
<td>Adams, Joe</td>
<td>CLERK</td>
<td>01/12/1983</td>
<td>$2,100.00</td>
<td>-</td>
</tr>
<tr>
<td>Jones, Robert</td>
<td>MANAGER</td>
<td>04/02/1981</td>
<td>$2,075.00</td>
<td>-</td>
</tr>
</tbody>
</table>
Renaming a Private Report in an Interactive Grid

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

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

The drop-down reflects the change immediately.
Deleting a Private Report in an Interactive Grid
A Private report can be deleted by going to the Actions menu, Report, Delete.

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

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

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

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

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

Select **CSV** and click the **Download** button.
Depending on your browser, you will be prompted to Save the file. Click OK.

The browser shows the download arrow complete.
The data opens in Excel.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Job Title</td>
<td>Hire Date</td>
<td>Salary</td>
<td>Commission</td>
<td>Location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Miller, James</td>
<td>1/23/1982</td>
<td>$1,300.00</td>
<td></td>
<td>NEW YORK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Clark, Lisa</td>
<td>6/9/1981</td>
<td>$2,450.00</td>
<td></td>
<td>NEW YORK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>King, Tom</td>
<td>11/17/1981</td>
<td>$5,000.00</td>
<td></td>
<td>NEW YORK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ford, Tina</td>
<td>12/3/1981</td>
<td>$3,000.00</td>
<td></td>
<td>DALLAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Scott, Kate</td>
<td>12/9/1982</td>
<td>$3,000.00</td>
<td></td>
<td>DALLAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Smith, Matt</td>
<td>12/17/1980</td>
<td>$800.00</td>
<td></td>
<td>DALLAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Adams, Joe</td>
<td>1/12/1983</td>
<td>$1,100.00</td>
<td></td>
<td>DALLAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Jones, Robert</td>
<td>4/2/1981</td>
<td>$2,975.00</td>
<td></td>
<td>DALLAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>James, Mary</td>
<td>12/3/1981</td>
<td>$950.00</td>
<td></td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Blake, Crystal</td>
<td>5/1/1981</td>
<td>$2,850.00</td>
<td></td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Allen, Charles</td>
<td>2/20/1981</td>
<td>$1,600.00</td>
<td>$300.00</td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Ward, Richard</td>
<td>2/22/1981</td>
<td>$1,250.00</td>
<td>$500.00</td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Martin, Bill</td>
<td>9/28/1981</td>
<td>$1,250.00</td>
<td>$1,400.00</td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Turner, Bob</td>
<td>9/8/1981</td>
<td>$1,500.00</td>
<td>$0.00</td>
<td>CHICAGO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If you need the file in xlsx format instead of csv format, go to File, Save As.

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

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

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