NEOGOV Report Builder Guide

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Preface

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Overview

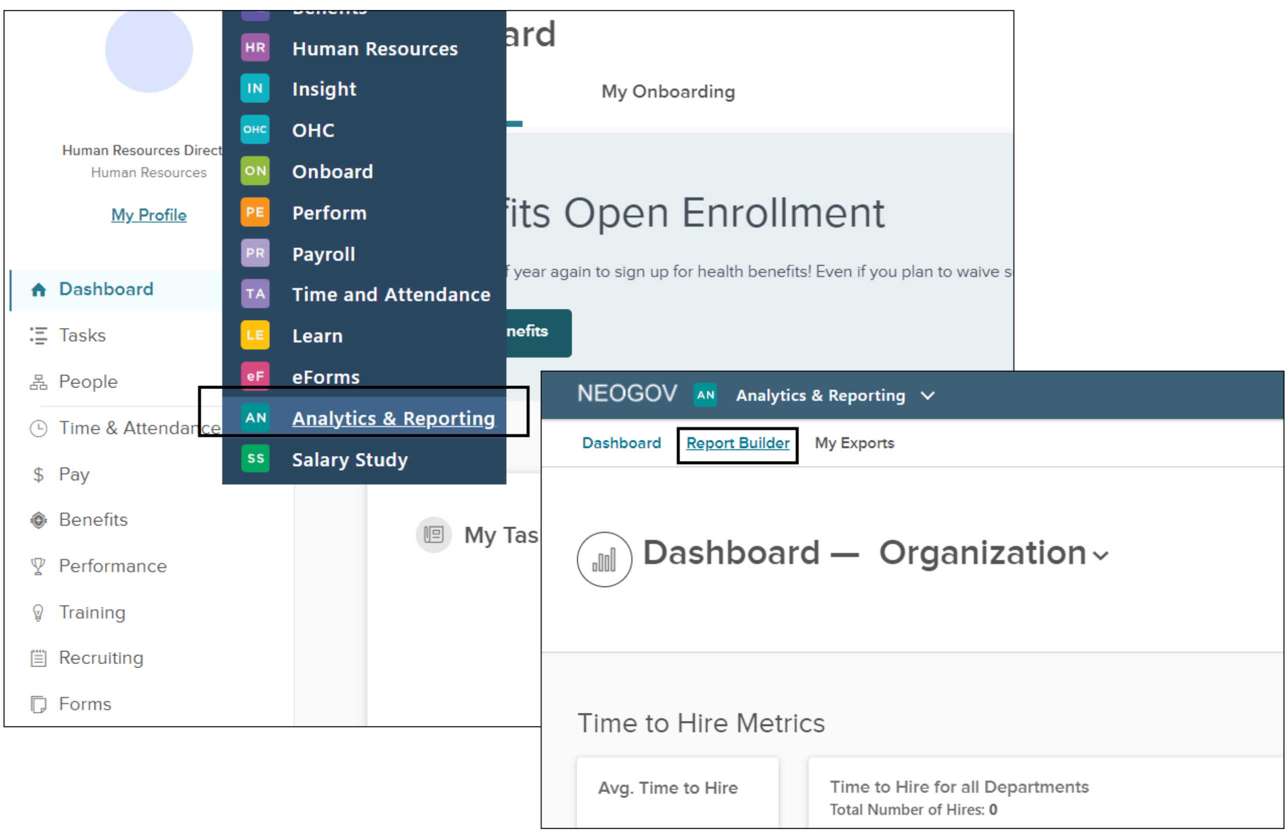
This guide is for authorized HR users who would like to analyze their company's data within the NEOGOV product line. The focus of this document is understanding using the **Report Builder**.

Report Builder

The **Report Builder** allows authorized users to build customized reports using fields from context-sensitive categories. You can click and drag the various fields into the report building frame and apply logic to create highly specialized reports.

	Best Practice: We encourage you to familiarize yourself with the available Boolean operators and how they can be combined to create powerful data filtering relationships. Refer to [Filters and Logic.](#)

To use the **Report Builder,** select **Analytics & Reporting** from the **Unified Self Service Dashboard** and click the link to **Report Builder**.



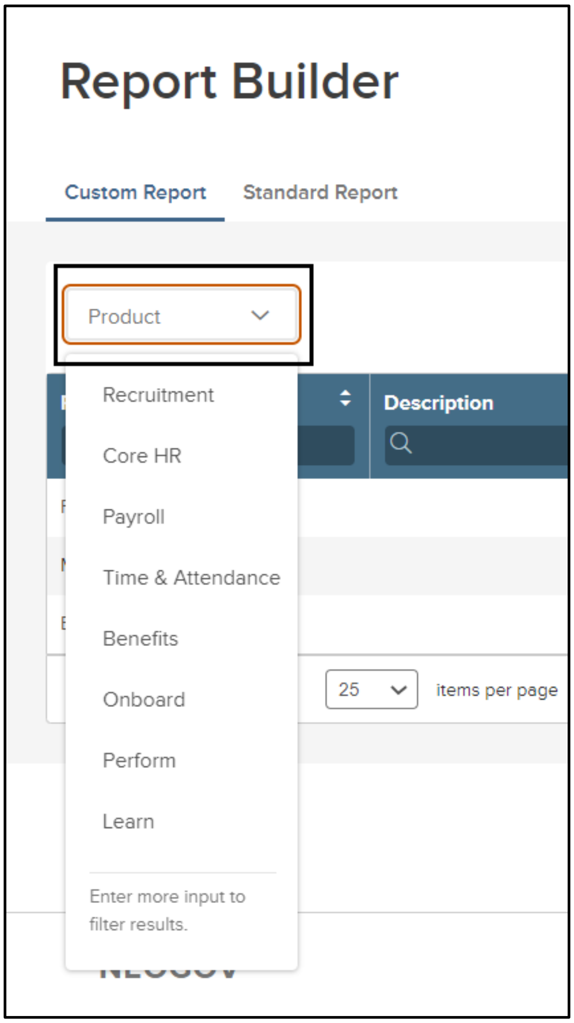
The initial **Report Builder** page displays the **Custom Report** and **Standard Report** tabs with a table of existing reports (for example, previously created and saved) by **Product**.

All existing reports you have permission to view are listed prior to applying filters. Reports created by other users must be permitted as **Public** for you to view the report.

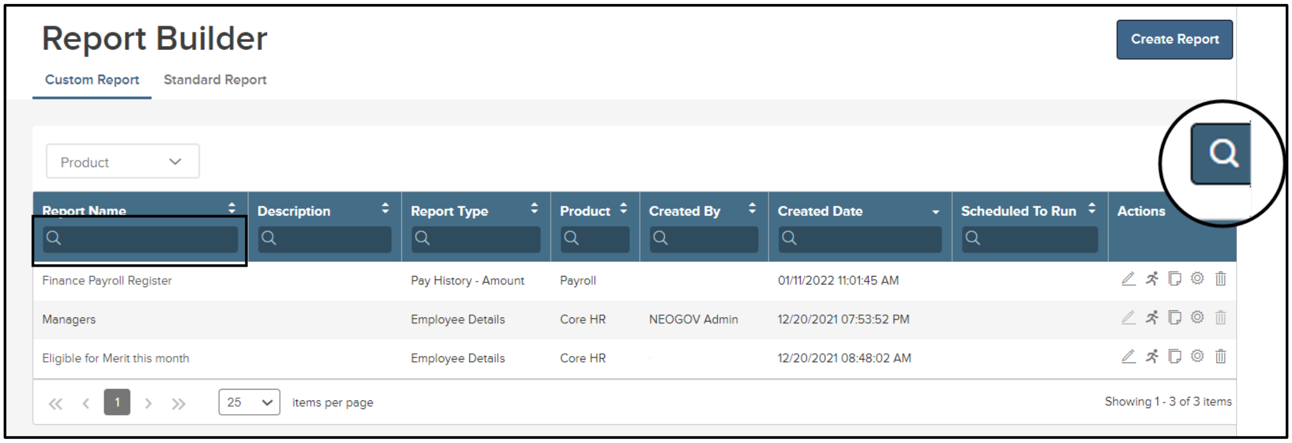
Search for Existing Custom Reports

To search for an existing **Custom Report**, do the following:

1. Select the appropriate module from the Product drop down list.



2. Click the **Search** icon above the existing **Custom Report** table.
    - This icon toggles between **Headers** and **Current State Search** modes.



3. Enter your search criteria in one or more of the **Search** field headings. You may search for existing reports using the following categories:
    - **Report Name**
    - **Description**
    - **Report Type**
    - **Product**
    - **Created By**
    - **Created Date**
    - **Scheduled To Run**

    As you enter your criteria the **Search** function begins to look up your report. Adjust the criteria as needed to search for the report.
    Click the **Clear Filters** link to reset the search or view all your existing reports.

4. Click the link to the report in the **Report Name** column to view the report.

Create a New Custom Report

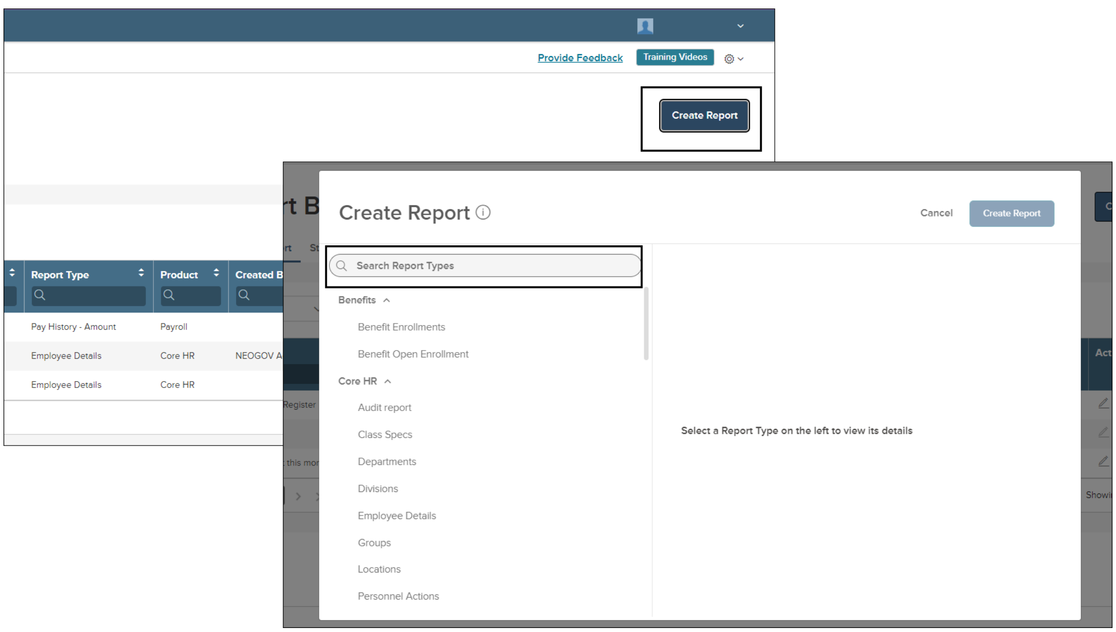
A brief description and the associated filter/column categories will display in the page's right frame.

For more information about the customization of your report see the following sections:

- **Filters and Logic**
- **Calculated Fields**
- **Sorting and Formatting Data**
- **Preview Custom Report**

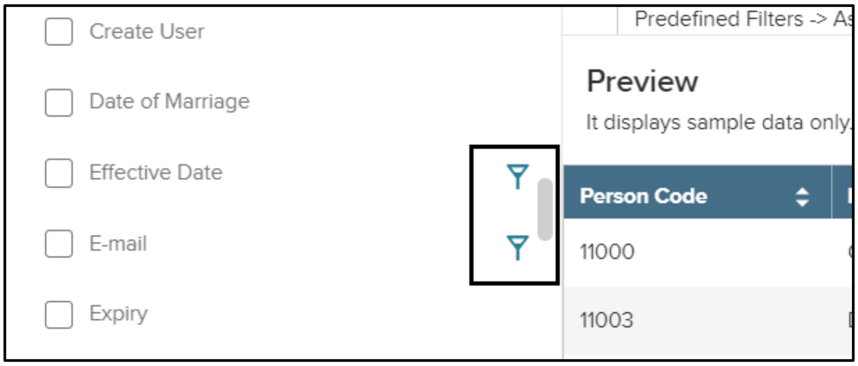
To create a new **Custom Report**, do the following.

1. From the **Report Builder Dashboard**, click **Create Report**.
    - A new window opens with a list of available **Report Types**.
2. Select a **Report Type** from the list or you may **Search** for a **Report Type** by entering your search criteria in the **Search Report Types** field.



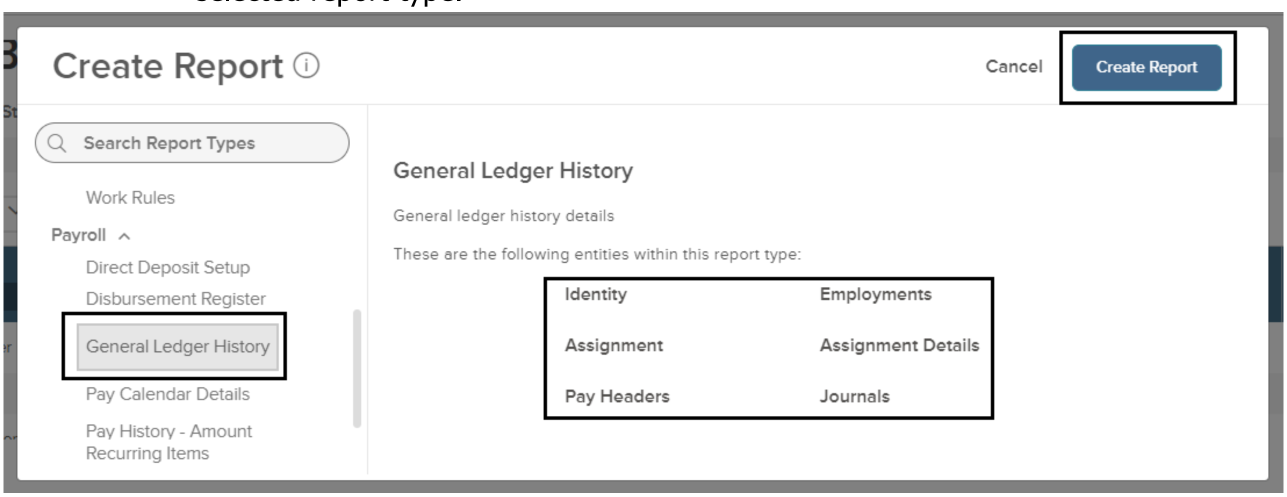
3. Select a **Report Type**.

   - The Report Builder will refresh and display the available filter and column option categories. Available filter fields are identified with a blue funnel icon.



4. Click **Create Report**.

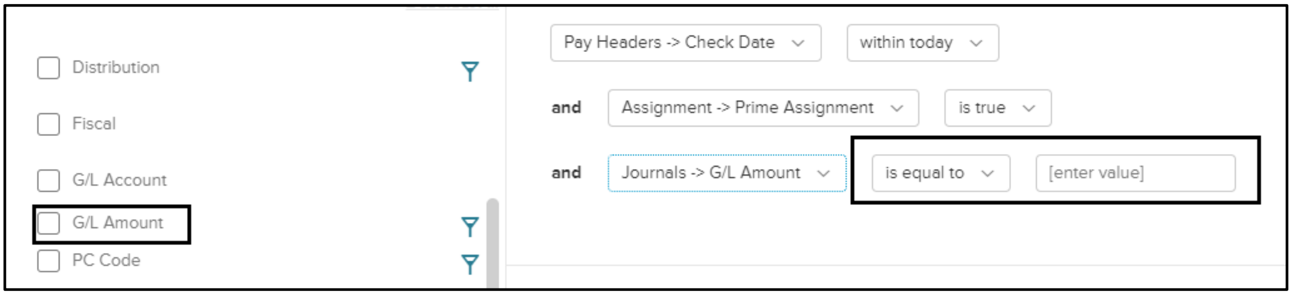
   - The **Report Builder** displays the available filter and heading categories for the selected report type.



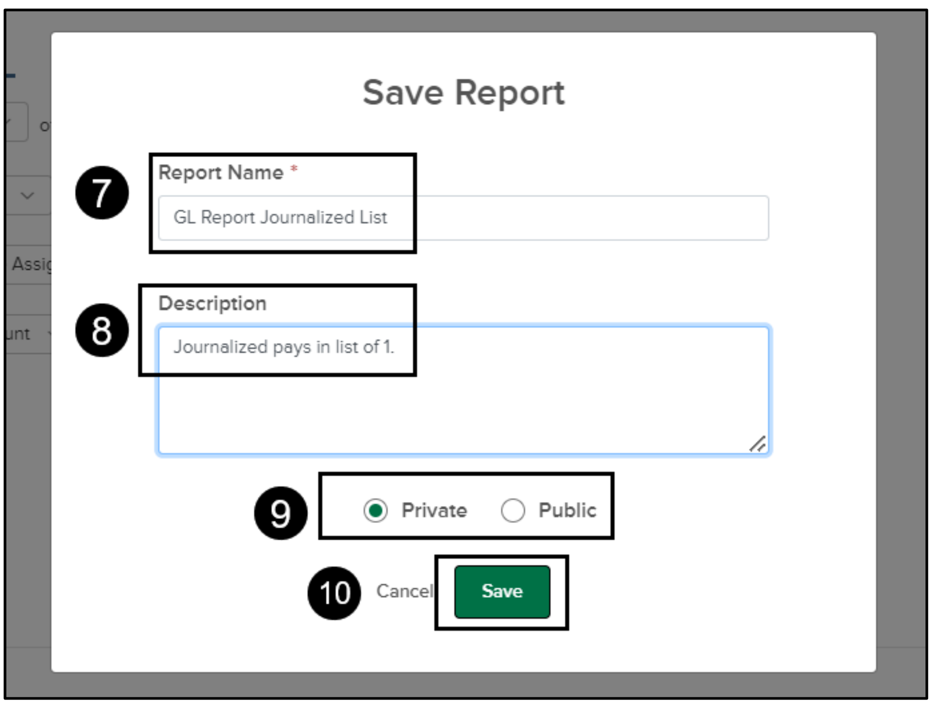
- The left frame displays a collapsible list of **Fields** for filtering and report columns; clicking any category in the left frame reveals options that can be added to a report.
- Specify filters and heading options as needed, by dragging them from the **Fields** list to the **Filters & Logic** tab; alternatively, specify filters by clicking their respective check boxes and then click the **Add to Filters** button.
- The top right frame holds the conditions to be applied in the filtering logic.

Click a field category in the **Fields** list to expand the category and reveal available fields. Fields may be added to the **Preview** section, these fields must also be added to the **Filters & Logic** section before running the report, or they will not appear in the report output.

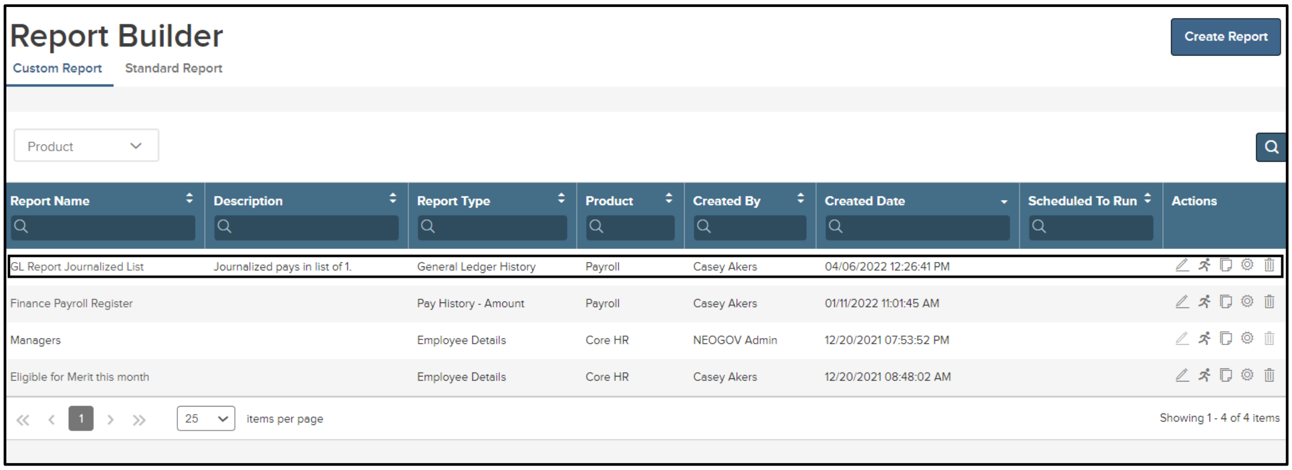
5. Specify the filtering logic for the selected fields using the drop down for conditions and additional fields to enter or select your criteria.



6. Click **Save & Run Report** to run the report immediately, or click **Save** to run the report later.
7. Type a name for the report in the **Report Name** field.
8. Type a brief description of the report in the **Description** field.
9. To make the report viewable by others within the organization click the **Public** permission check box.
    - To make the report visible to you only do not change the default **Private** permission check box.
10. Click **Save**.



The report will be saved; the report output and the specified filters will display on the **Report Builder** page.



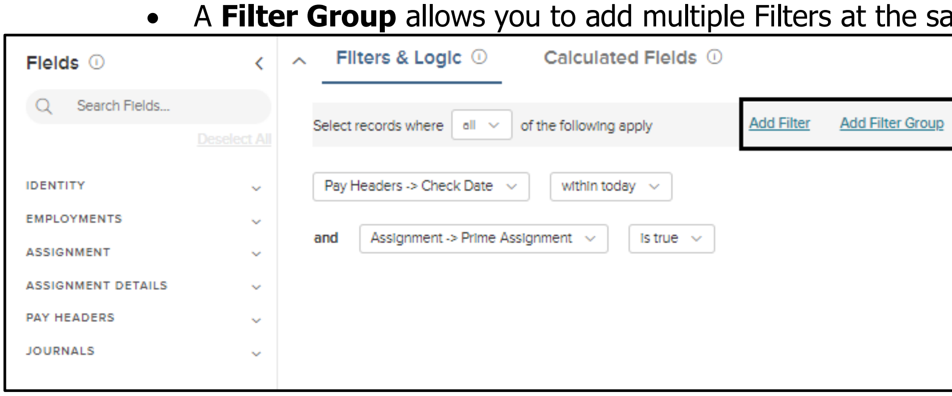
Filters and Logic

You can change, add, delete, or disable filters and logic in the **Filters & Logic** tab. From the **Filters & Logic** tab, notice the preset conditions based on selected **Report Type**. You may customize **Filters** to satisfy your reporting requirements.

Add a Filter or Filter Group

To add a **Filter** or **Filter Group**, do the following.

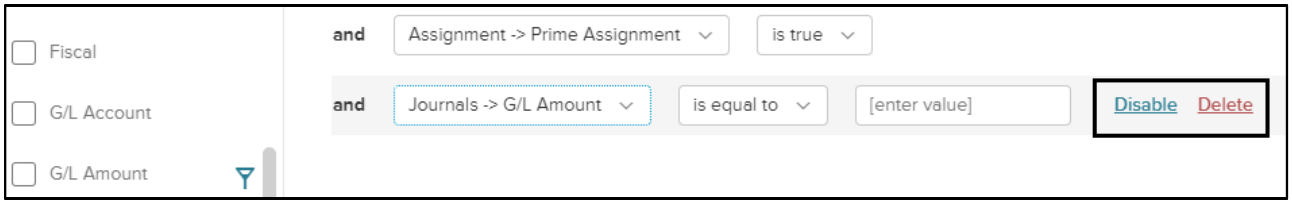
1. Focus on the first statement: "**Select records where all of the following apply**".
2. Select **Add Filter** or **Add Filter Group**.
    - A **Filter Group** allows you to add multiple Filters at the same time.



Delete Filter or Disable Logic

To **Delete** a filter or **Disable** logic, do the following.

1. Focus on the field in the **Filters & Logic** tab.
2. Click **Delete** or **Disable**.

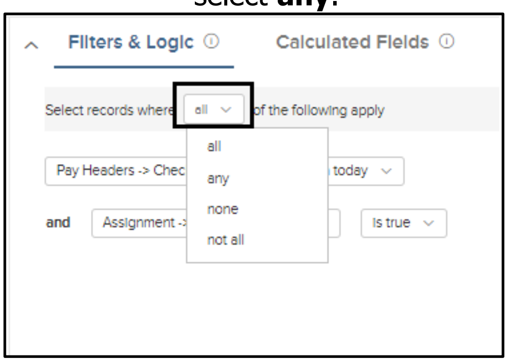


Change Operator

Operators will depend on the type of selected field. Click the text that displays to the right of the field name to see all selections. Click the **Operator** best suited for your criteria.

To change the **Operator** logic for any statement, do the following.

1. Select from the operator logic drop down.
   - For example, if you want to any records that include the following statements select **any**.



Calculated Fields

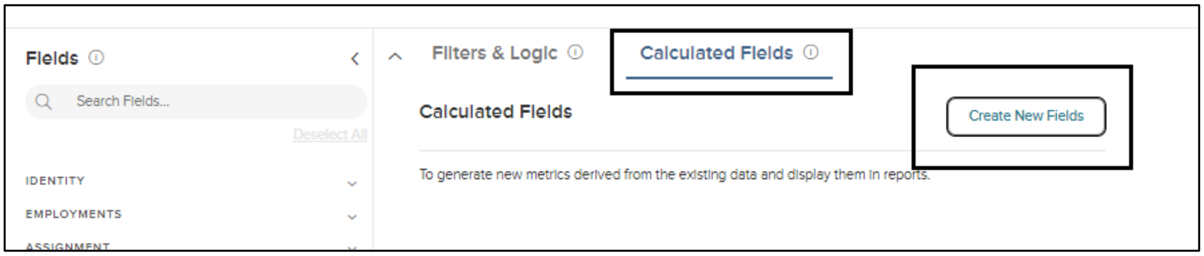
Calculated Fields helps you to create compound fields out of existing fields and predefined list of operators

Create a Calculated Field

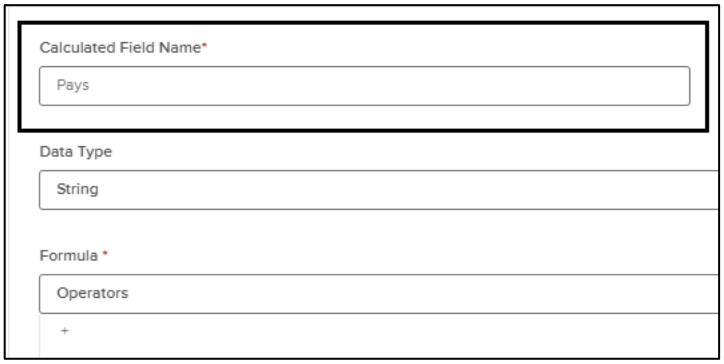
To generate new metrics derived from the existing data and display them in the report add a calculated field, by doing the following:

1. Click the **Calculated Fields** tab.

2. Click **Create New Fields**.

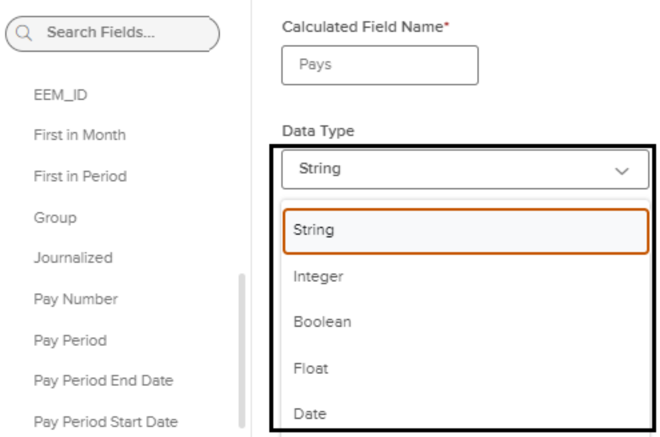


3. Enter a **Calculated Field Name** (this is required).

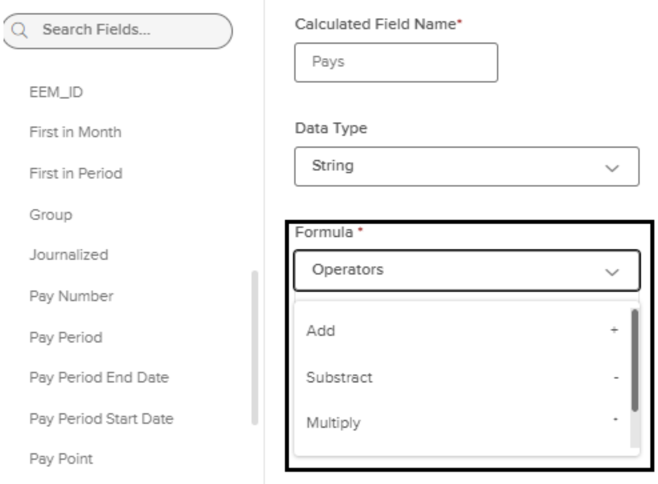


4. Select one of the following **Data Types**:

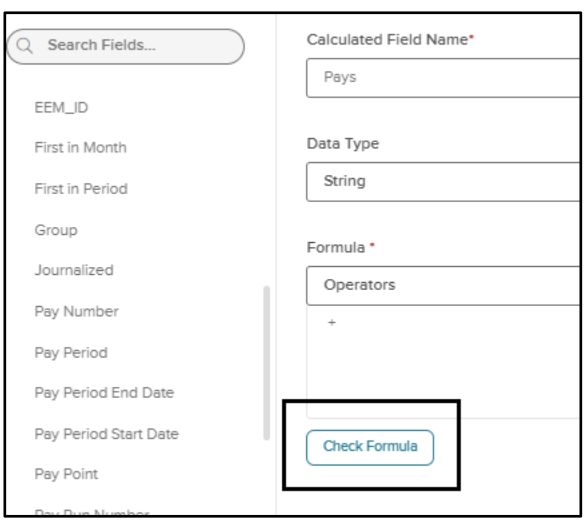
- **String** (a sequence of characters)
- **Integer** (whole numbers)
- **Boolean** (true or false)
- **Float** (a number that is not an integer)
- **Date**



5. Select one of the following **Operators** in the **Formulas** section (this is a mandatory field. Without providing any formula, the calculated field cannot be saved).
    - **Add**
    - **Subtract**
    - **Multiply**

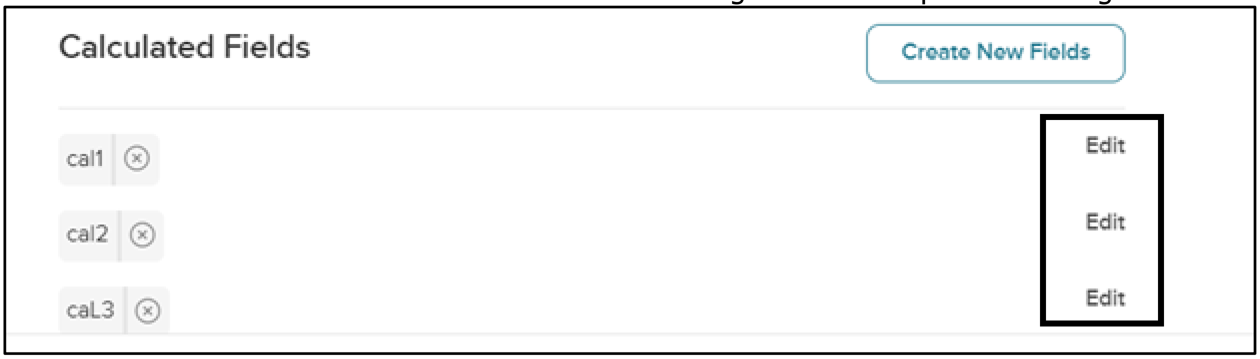


6. Once the formula is provided, the given formula can be validated clicking **Check Formula.**
    - A calculated field can be saved without checking the formula by clicking the **Save** button.
    - When the provided formula is validated a successful validation pop-up window displays.
    - If an invalid formula or column name is identified a message with the invalidation information is displayed. The **Invalid Calculated** field can be viewed under the **Calculated Fields** list with a warning message and the column won't be added to the **Preview**.

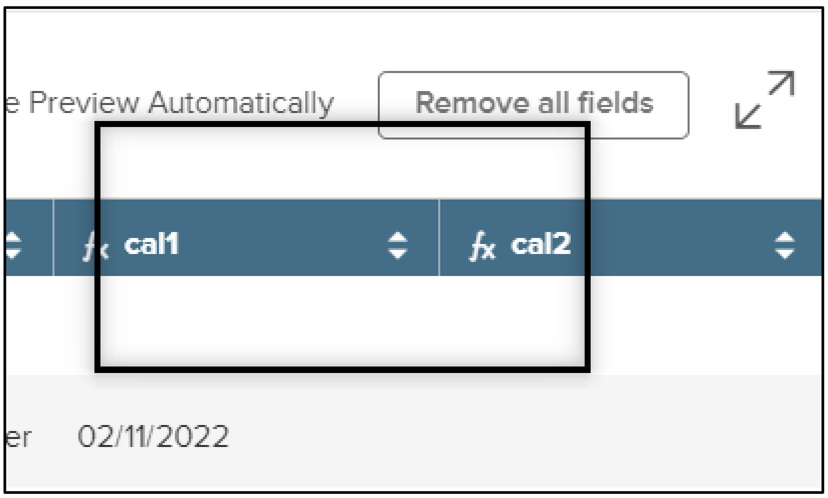


7. When the formula has been validated, click **Save.**
    - Once the calculated field is saved, the list of calculated fields created is seen under **Calculated Fields** above the **Preview**.

- Each calculated field can be edited clicking on the edit option at the right corner.



The columns to be added can be either dragged and dropped or can be chosen from the drop down list.
The column header for calculated fields created have a prefix **fx**. Any function can be applied on calculated columns.



Example Formula

SUBSTRING(string, start, length) -- SQL Syntax

SELECT SUBSTRING('SQL Tutorial', 1, 3) AS ExtractString; -- SQL

SELECT SUBSTR('Oracle Substring', 1, 6)

SUBSTRING FROM dual; -- Oracle Calculated field:

7 datediff(hh,requisition created date,requisition approved

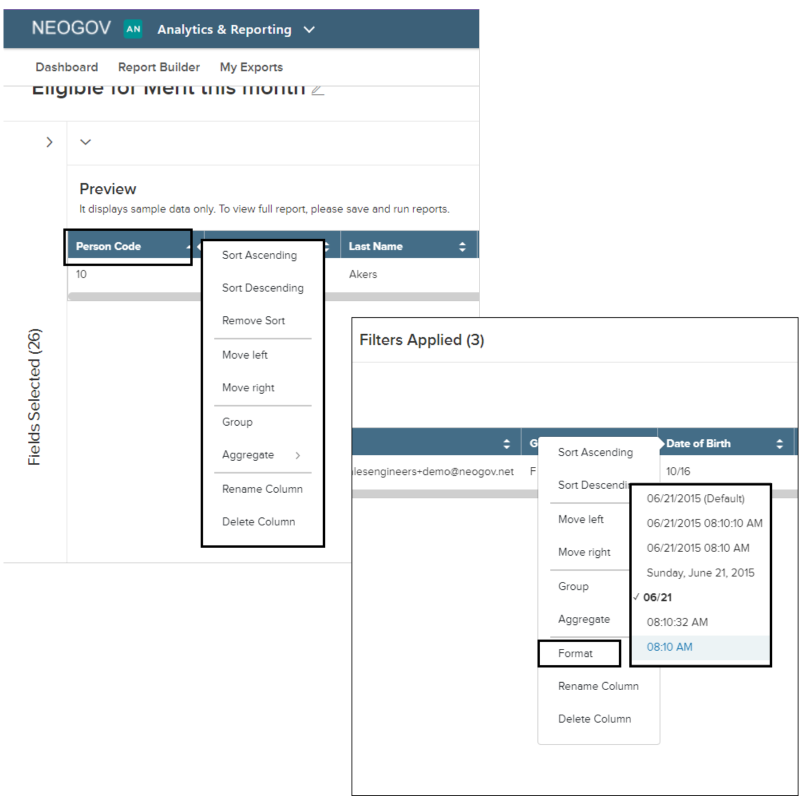
date)

UPPER(CONCAT(FIRSTNAME,LASTNAME))

Sorting and Formatting Data

After generating a **Custom Report**, you may apply various sorting and formatting tools to the data.

1. From the **Report Builder**, choose a report from the table by clicking the report name.
    - The **Report Builder** displays the selected report in the **Preview** section.
2. Click the heading of any column in the report **Preview**. A list of sorting options appears:
    - **Sort Ascending**
    - **Sort Descending**
    - **Remove Sort**
    - **Move left**
    - **Move right**
    - **Rename Column**
    - **Aggregate**
    - **Delete Column**.
3. Select an option from the list to **Format** or **Sort** the data.



Preview Custom Report

The **Preview** allows you to instantly see the first five rows of data with pre-selected fields based on the report type before running the report.

Add a Field to Preview

To add a **Field** to the **Preview**, do the following.

1. From the **Fields** menu, search for the field to be added.
2. Once you've found the field, drag-and-drop it to the **Preview** section, or select the field, and click **Add to Preview**.
3. Drag-and-drop the new column into your preferred display position.

Rename a Column

To rename a **Column**, do the following.

1. Click the column header name and click **Rename Column**.
2. Enter your new column name and click the check icon.
3. Repeat these steps for any other columns requiring different names.

Move a Column

To move **Columns**, do the following.

1. Click the **Column Header** you want to move.
2. Drag-and-drop the **Column Header** to the new position.

Delete a Column

To delete a **Column**, do the following.

1. Click the column header name and click **Delete Column**.
2. Repeat these steps for any other columns requiring deletion.

Actions

To access the **Actions** menu click **Report Builder** from the top menu.

Icons in the **Actions** column allow you to edit, run, copy, and delete reports; you may also designate reports as **Public** or **Private** and set up a schedule to run reports automatically.

The **Actions** menu allows you to do the following with **Custom Reports**:

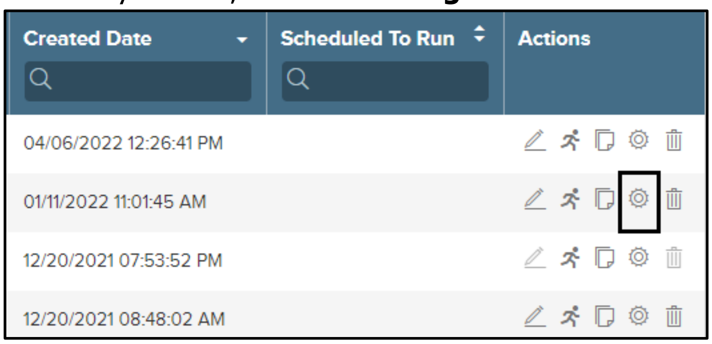
- **Edit** – edit the parameters of an existing report
- **Copy** – make a copy of an existing report
- **Run** – run and change the parameters of an existing report

- **Delete** – delete an existing report

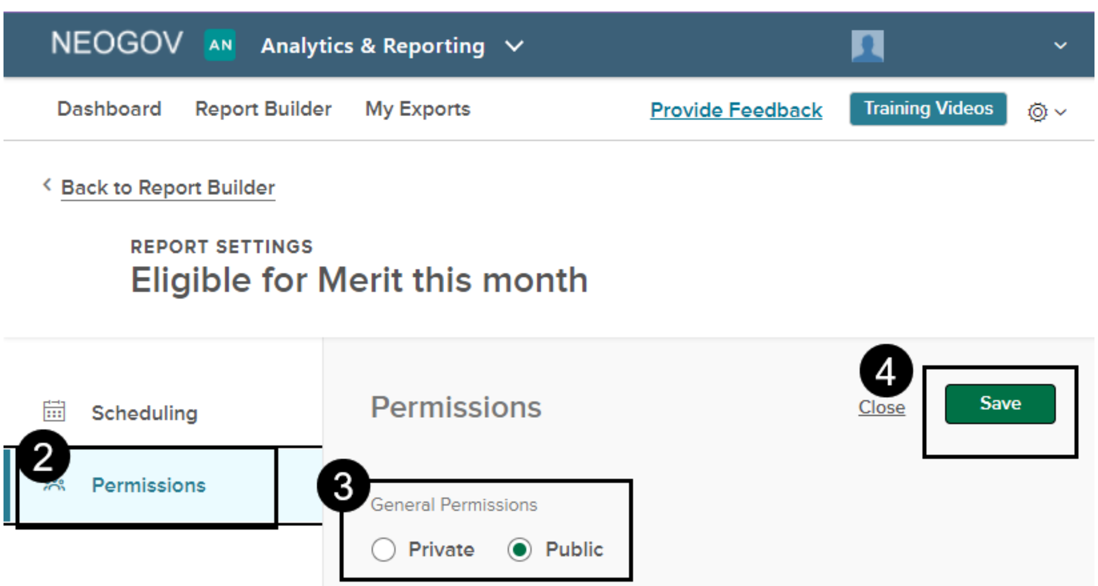
Permissions

Report authors can set their reports for either **Public** viewing or **Private** (author only) viewing.

1. From the Report Builder, select a report from the table and click the **Open Settings** (gear) icon.
   By default, the **Scheduling** tab is selected.



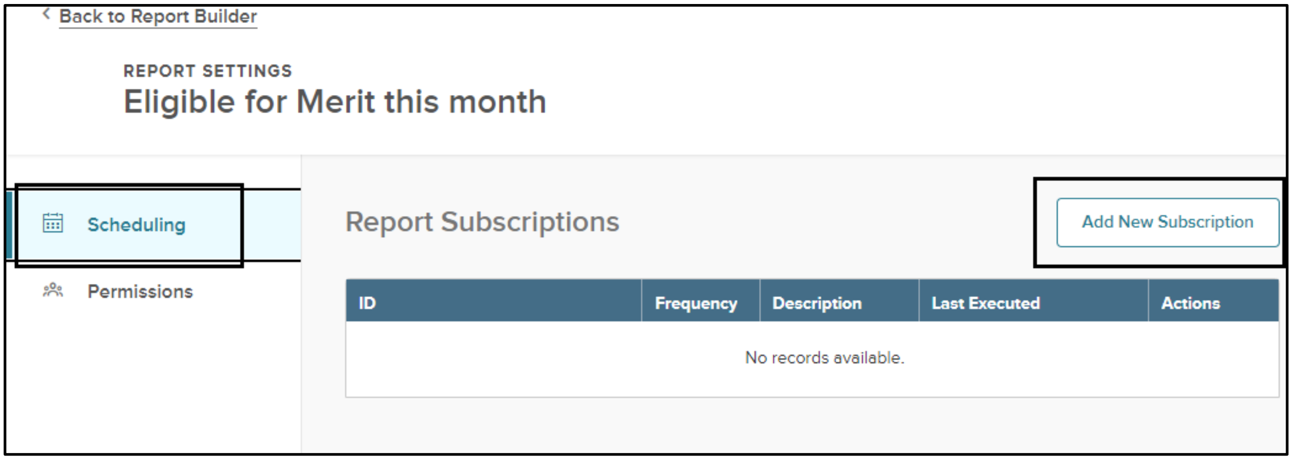
2. Select **Permissions** from the left menu.
3. Specify the General Permissions: **Private** or **Public.**
4. Click **Save**.



Schedule a Custom Report or Add a Subscription

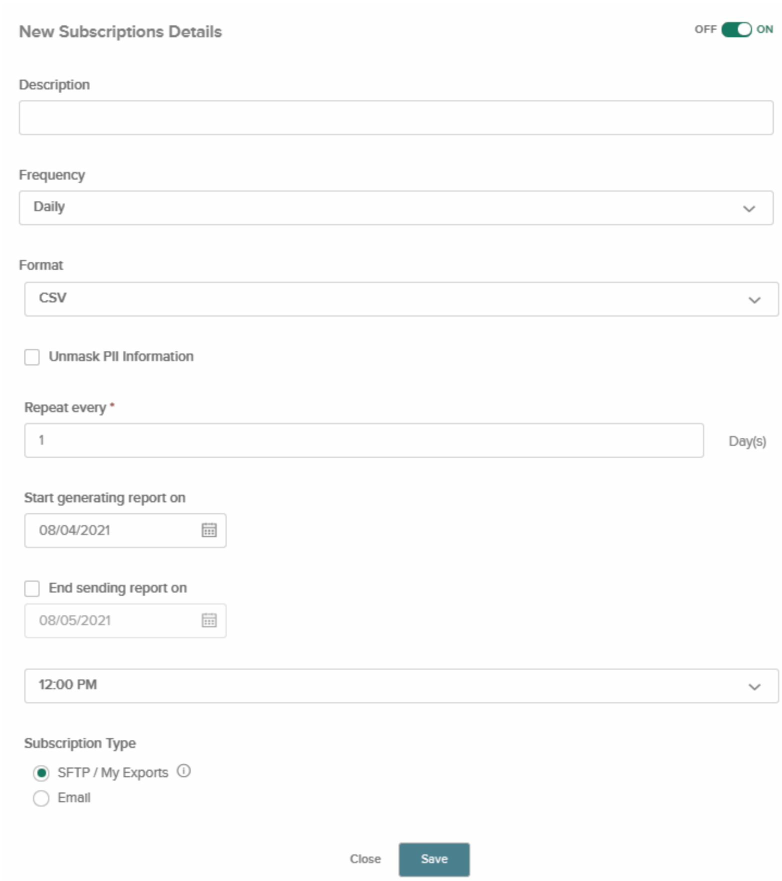
Ad hoc reports may be scheduled to run automatically at specified time/date intervals. To add a subscription that captures a snapshot of data on a recurring frequency or setup a report to run on a routine basis, do the following.

1. From **REPORT SETTINGS**, select **Scheduling** from the left menu.



2. Click **Add New Subscription**.
3. In the **New Subscription Details** window, specify the necessary options from the following list.
    - **OFF/ON:** Used to activate/deactivate the report subscription (Default position is **ON**, to activate the report subscription).
    - **Description:** Provides details about the report subscription.
    - **Frequency:** Selection determines how often reports should be generated: **Daily**, **Weekly**, **Monthly**, and **Annually**.
    - **Format:** Selection determines the report output format of **CSV** or **XLS.**
    - **Unmask PII:** Selection adds **Personal Identifiable Information** to the reporting system.
    - **Repeat Every:** Select a numerical value (1 to 100 days) to specify the time interval for generating and sending reports.
    - **Start Generating Report On:** Determines the date to start running the report subscription.

- **End Sending Report On:** Determines the date to stop running the report subscription.
- **Subscription Type:** Determines the method for sending the generated reports: **SFTP / My Exports** or **Email**.



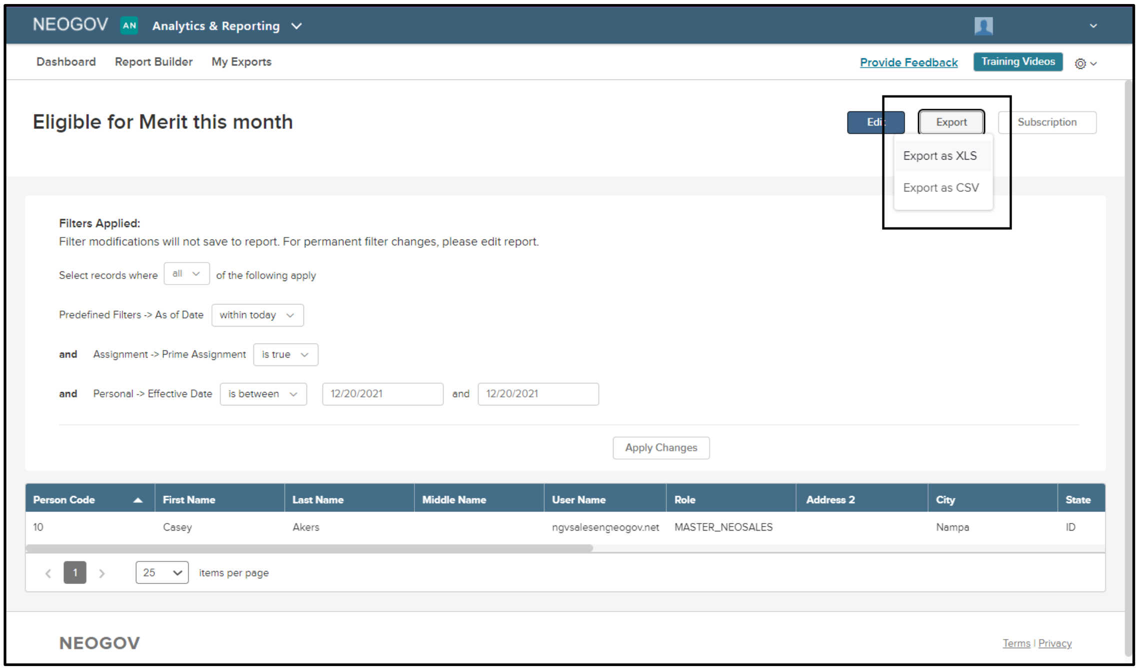
4. Click **Save**.

Export and Download a Custom Report

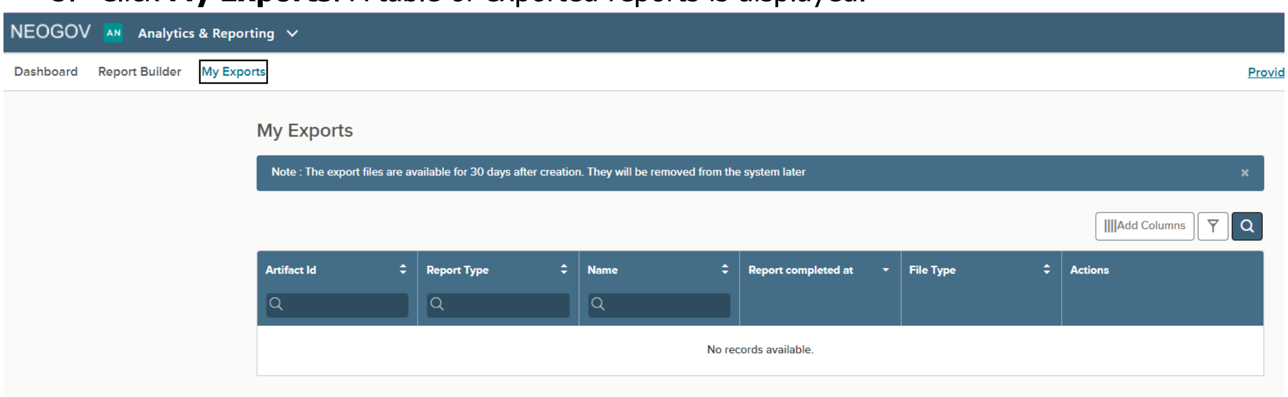
Custom Reports may be exported for additional viewing and processing. Reports must be saved in the system before they can be exported. Exported reports are saved in the system for 30 days.

1. From the **Report Builder**, click **the Report Name** from the existing reports list.

2. Click the **Export** button and select **Export as CSV** or **Export as XLS**.



3. Click **My Exports**. A table of exported reports is displayed.



4. Click the **Download File** button for the appropriate report. The report will be saved to the **Downloads** folder.

Appendix

Report Types

The following **Report Types** are available based on the NEOGOV products you use and your access.

Report Type	Report Template
Benefits	• **Benefit Enrollments** • **Benefit Open Enrollment**
Core HR	• **Audit Report** • **Class Specs** • **Departments** • **Divisions** • **Employee Details** • **Groups** • **Locations** • **Personnel Actions** • **Positions** • **Salary Ranges** • **Scales** • **Units** • **Work Rules**
Payroll	• **Direct Deposit Setup** • **Disbursement Register** • **General Ledger History** • **Pay Calendar Details** • **Pay History - Amount** • **Pay History - Pay Line Details** • **Pay Transactions** • **PC Set up** • **Pending Pay Transactions** • **Recurring Items** • **Tax Reconciliation** • **Tax Setup** • **Vendor Pay Lines**

Time & Attendance	• **Clock Entries** • **Leave Details** • **Leave History** • **Timesheet** • **Work Schedules**
Recruitment	• **Applicant** • **Applicant with Exams** • **Applicant with Job Application and Eligible List** • **Applicant With Referred List And Offers/Hires** • **Insight Users and Security Roles/Permissions** • **Job Information** • **OHC Evaluation Step Candidates** • **OHC Users and Security Roles** • **Requisition Lifecycle**

Filter Categories

The **Report Builder** provides context-based filter and column options for each product and report type.

Identity

Filter Type	Field
IDENTITY	• **Personal data fields:** • **Date of Birth** • **Driver's License** • **Ethnicity** • **External Retirement Id** • **First Name** • **Gender** • **Govt Code Origin** • **Identity ID** • **Language** • **Last Name** • **Middle Name** • **MMREF Officer Code** • **MMREF Probationary** • **Person Code** • **Rank** • **Role**

	• **Role Description** • **S.S.N. Verified** • **Salutation** • **SSN** • **US Ethnicity** • **US Race** • **User Name** • **Veteran Status** • **W2 Destination**

Personal

Filter Type	Field
PERSONAL	Personal data fields: • **# Dependents** • **Address 1** • **Address 1 (Mail)** • **Address 2** • **Address 2 (Mail)** • **Alt. Phone #** • **Bonded Status** • **Change Date** • **Change Reason** • **Change User** • **Citizen Status** • **City** • **City (Mail)** • **Country** • **Create Date** • **Create User** • **Date of Marriage** • **Effective Date** • **E-mail** • **Expiry** • **Fax #** • **Foreign ID** • **Home Jurisdiction Code** • **Home Jurisdiction Name** • **Marital Status** • **Personal** • **Phone (Cellular)** • **Phone (Personal)** • **Phone Unlisted**

	• **School District** • **State** • **State (Mail)** • **Transportation** • **Years of Education** • **Zip** • **Zip (Mail)**

Employments

Filter Type	Field
EMPLOYMENTS	• **ACA Stability Date** • **EID ID** • **Employment** • **Employment Type** • **Entity** • **Expected Return** • **First Work Date** • **Gr Electronic Consent** • **Gr Electronic Consent Date** • **Gr Electronic Consent By** • **Gr Last Year Printed** • **Hire Date** • **Hiring Sequence** • **Income Guarantee** • **Last Pay #** • **Last Work Date** • **Original Hir Date** • **Rehire Status** • **ROE Comments** • **ROE Issued** • **ROE Letter** • **ROE Status** • **Seniority Date** • **Term Date** • **Term Reason**

Assignments

Filter Type	Field

ASSIGNMENT	• **Assignment** • **Assignment End Date** • **Assignment ID** • **Assignment Start Date** • **Assignment Status** • **Assignment Type** • **New Review Date** • **Prime Assignment** • **Wage Progress Date**
ASSIGNMENT DETAILS	• **ACA Category** • **Aca Excluded** • **Additional Manager(s)** • **Annual Salary** • **Assignment Detail ID** • **Authorization Area** • **Baca Id** • **Burden Method** • **Burden Percent/Rate** • **Bypass Org Chart** • **Contract Days** • **Contract Limit** • **Dcl Id Fisa** • **Department Code** • **Department Title** • **Designated Approver** • **Division** • **Division Name** • **EAS_ID** • **EASD Change Reason** • **Effective Date** • **Email** • **Employment Status** • **Expiry** • **External Appointment Id** • **External Memo** • **FLSA Calendar** • **FTE** • **Fulltime Wage** • **Group** • **Hours/Day** • **Hours/Pay** • **Hours/Week** • **Job Code** • **Job Profile** • **Job Seniority Date**

	• **Job Title** • **Leave Date** • **Leave Reason** • **Leave Return Date** • **Long Term Assignment** • **Manager** • **Org Record Type** • **Out of Range** • **Periods Elected** • **PERSI Report Hours** • **Phone #** • **Phone Ext.** • **Pos. Start Date** • **Position Code** • **Position Title** • **Provide Internal Service** • **Provide Public Service** • **Rate Basis** • **Replacement** • **Requires Timesheet** • **Responsibility Level** • **Salary Range** • **Scale Code** • **Scale Overridden** • **Scale Rate** • **Send Pays to Location** • **Service Rating** • **Sp Comments1** • **Sp Comments2** • **Sp Competency Rating** • **Sp Designated Successor** • **Sp High Potential Rating** • **Sp Impact of Loss** • **Sp Readiness** • **Sp Retention Risk** • **Sp Successor Risk** • **Ssa Id** • **Start Date of Pay** • **Step Code** • **Supervisory** • **Time Reviewer** • **Title** • **Trigger Be Retro** • **Trigger Retro Pay** • **Unit Code** • **Wage Rate** • **WC Class**

	• Web Pay Stub Only • Work Calendar • Work Jurisdiction Code • Work Jurisdiction Name • Work Location • Work Rule • Work Type

Clock Entries

Filter Type	**Field**
CLOCK ENTRIES	• Adjusted Date • Adjusted Time • Clock • Clock Card • Cost Center • Job Code • Message • Original Date • Original Time • Source • Status • Time Code • Type

Predefined Filters

Filter Type	**Field**
PREDEFINED FILTERS	• As of Date

Operators

The available Boolean operators will be predicated on the fields in the **Filter & Logic** tab.

Best Practice: We encourage you to practice using the various available Boolean operators, to understand how they can affect the report data output.

Logic	Example
All	A and B
Any	A or B
None	Neither A nor B
Not All	Not A and B

Other filtering parameters allow you to apply additional operators to the filtering logic:

- starts with
- contains
- is equal to
- is not equal to
- is null
- is not null