AURIS™

Report Writer:
Client User Guide

This client user guide for the Report Writer feature covers creating, editing, filtering, and generating custom reports.

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What is Report Writer?

Report Writer is a quick and efficient way to create custom reports that is easy to understand by users with varying skill sets. It walks the user through selecting a report type, report title, page layout, default report format (PDF or Excel), columns, sorting, totaling, page breaks, filters, column headings, column size, font, and font size. Custom Reports can be added to the On Demand Reports or the Date Range Report list, depending on the report type.

Benefits of the Custom Report Writer

- It is user-friendly so that you can build custom reports with ease.
- The Report Writer feature is offered at no additional charge.
- Most custom reports can be added to your preview scheduled reports and even your payroll package.
- It provides the flexibility of creating reports that show information in a custom manner.
- Reports can be generated in PDF or Excel format.

Types of Custom Reports

HR Report: (*Payroll + HR product Only*) This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date and include the HR-specific categories included with the HR product.

Payroll Employee Report: This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date or a specific payroll run.

Payroll Check Detail Report: This type of report has a single row of data for each employee. Reports can be generated for an *As Of* date or a specific payroll run. Check accumulation fields display the accumulations as they were on the *As Of* date or the specific payroll run.

Date Range Report: This type of report has multiple rows of data for each employee (one row of data per payroll run, within the date range, for each employee). Reports are generated for a date range.

💡 *Labor Allocation: Custom Report Writer was built at the employee level and cannot be utilized for building employer labor allocation reports.*

- Employees are assigned to a Home Department in the system. Even if an employee's wages are allocated to several departments with payroll, the wages will be assigned to the Home Department in Custom Report Writer. Check out your *Labor Allocation Detail* or *Labor Allocation Summary* report for the proper breakdown of employee labor allocation.
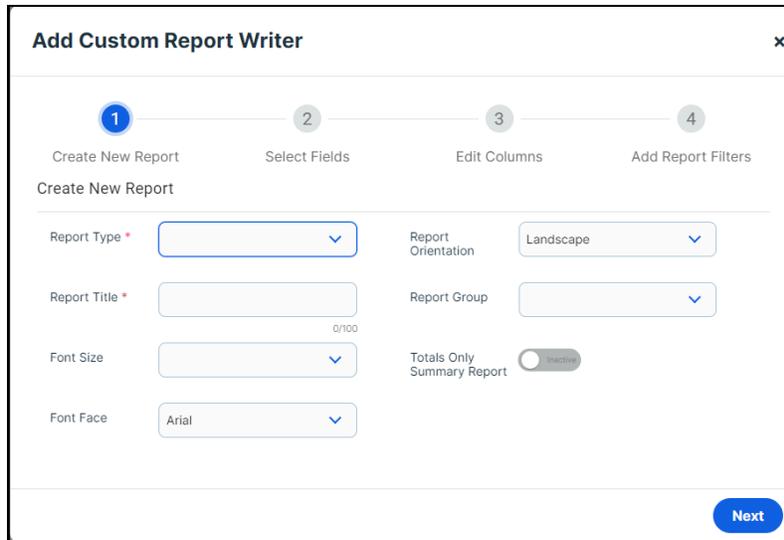
Report Writer in Auris

Reports → Custom Reports → Custom Report Writer → Add Custom Report Writer

Create a New Custom Report

Select **Add Custom Report Writer.** The first step in the wizard establishes the report type, report title, font and font size, orientation, and report group.

Report Type is used to select the type of report that will be created.
*The Report Type **cannot** be changed after the Save button has been selected.*

Report Orientation defaults to *Landscape*. *Portrait* is the other option.

Report Title is used to enter a title that will print on the report.
*The Report Title **can** be changed after the Save button has been selected.*

Report Group is used to grant access to reports based on the group assigned to the Client User.

Select Default Report Group. *If this field is left blank, the report will not be viewable.*

Font Size ranges from 6pt – 12pt.

Totals Only Summary Report toggle is used to create reports that have totals only instead of showing employee detail.
If you want this, you will need to toggle to Yes.

Font Face (style) defaults to Arial.
Additional options include Times New Roman, Tahoma, Microsoft Sans Serif, Courier New, Arial Black, and Verdana.

Select Fields

The *Select Fields* step is a quick method to select all columns used on the report.

Once the **Field Category** is selected, the **Column** box will display all columns for that category.

Columns can be selected from multiple field categories by simply selecting another field category from the drop-down menu. *When assigning the fields, Division Code, Department Code, Employee Number, and Employee Name (First Last) will be displayed by default.*

- **Add** a column by clicking the plus (+) sign next to the desired column.
- **Remove** a column by clicking the minus (-) sign next to the column.
- The number of columns displayed on a report is determined by the report format and column size selected.
    - **PDF Format:** If there isn't enough room to display all columns, then the columns that exceed the printable area on the right will not display.
    - **Excel Format:** A *maximum of 256 columns* can be selected.

💡 *We recommend removing the default Employee Name (First Last). Selecting instead the First Name and Last Name columns individually, as shown above. This is an easier way to sort and filter by employee name.*

Edit Columns

Edit Columns are used to format the report columns, designate sorting, define totals, and page breaks.

Edit Custom Report Writer ✕

	Create New Report ✓	Select Fields ✓	Edit Columns ③	Add Report Filters ④

Edit Columns

Add Column

	Column	Heading 1	Heading 2	Width	Sort	Group	Actions
+	1	Birth	Date	0.65			⊖
+	2	Employee	Number	1			⊖
+	3	Employee	First Name	1			⊖
+	4	Employee	Last Name	1			⊖
+	5	Employee	Middle Name	1			⊖
+	6	Employment	Status	1			⊖

The Columns you selected will be listed in the *Edit Columns* section.

- **Edit** the columns by selecting the plus (+) sign next to the column to edit.
- **Remove** a column by selecting the (-) in the Actions column.

Heading 1 and **Heading 2** are used to enter column headings that are displayed on the report.

> *To see one line for the Heading, you can move all verbiage from Heading 1 to Heading 2. There are spacing limits, the Heading verbiage or Column Width may need to be edited.*

Hidden Column toggle is used to indicate the column should not be displayed on the report.

> *Necessary when a column is needed for calculation and/or filtering purposes but should not be displayed on the report.*

Default Value is used to enter a default value when the value is *null* in the system. The max field length is 50 alphanumeric characters.

Column Position is used to sequence the columns from left to right.

Column Width is used to adjust the width of a column if needed. The database assigns a default column width for each column.

Format String drop-down is used to select a format to display the data.

Column Alignment drop-down is used to select an alignment for each column.

	Column	Heading 1	Heading 2	Width	Sort	Group	Actions
+	1	Birth	Date	0.65			⊖
+	2	Employee	Number	1			⊖
+	3	Employee	First Name	1			⊖
−	4	Employee	Last Name	1			⊖

Column Details

Field Category:	**Employee Data**	Column Position	4 ⌄
Field:	**Employee Last Name**		
Heading 1	Employee	Column Width	1
Heading 2	Last Name	Format String	⌄
Hidden Column	◯ No	Column Alignment	Left ⌄
Default Value		Sort Position	1 ⌄
		Sort Direction	Ascending ⌄
		Group By	◯ No
		Page Break	◯ No
		Aggregate Function	⌄

Done **Cancel**

Edit Columns (cont.)

Sort Position drop-downs are used to define how the report should be sorted.

> *The first drop-down is used to select a sort position (ex. 1,2,3).*
> *The second drop-down is used to select Ascending (ex. A, B, C) or Descending (ex. Z, X, Y).*

Group By **toggle** is used to group the sorted data. Grouping data allows for the use of subtotals for the group.

> *This toggle is only enabled if there is a sort selected.*

Page Break **toggle** is used to define page breaks.

> *This toggle is only enabled if there is a sort selected.*

> *A page break will be inserted whenever the sort field value changes.*

Column Details	
Field Category: **Employee Data**	Column Position: 4
Field: **Employee Last Name**	Column Width: 1
Heading 1: Employee	Format String:
Heading 2: Last Name	Column Alignment: Left
Hidden Column: No	Sort Position: 1
Default Value:	Sort Direction: Ascending
	Group By: No
	Page Break: No
	Aggregate Function:
	Done Cancel

Aggregate Function drop-down is used to define what the column totals represent.

> *Sum:* all field values in the column are added together.
> *Count:* a count of *1* is applied to every field in the column that isn't null.
> *Average:* all field values in the column are added together and then divided by the number of rows to come up with an average.
> *Minimum Value:* all field values in the group columns are searched, and the minimum value is at the end of every group.
> *Maximum Value:* all field values in the group columns are searched, and the maximum value is at the end of every group.

Add Report Filters
Report filters are used to include or exclude employees from a report. Multiple filters can be utilized.

Edit Custom Report Writer ✕

Create New Report ✓ — Select Fields ✓ — Edit Columns ✓ — Add Report Filters ④

Report Filters

Add Filter

| Column	Actions
No Records Found	

Back Save

- Report Filters are *AND* commands. Report results only show data that meets *ALL filters*. If no data generates and there is more than one filter, the filters will need to be adjusted or removed.

- All employees will be displayed on the report if there isn't a report filter.

(continued)
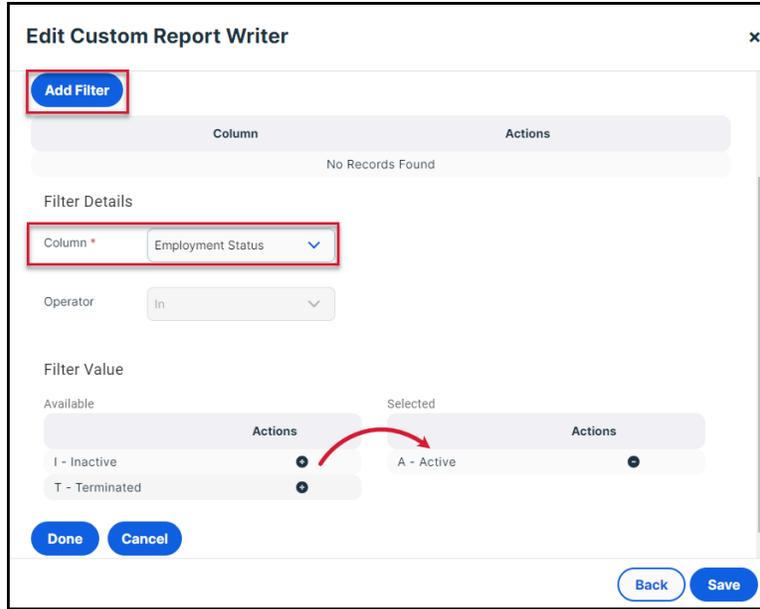
- To add a report filter, select **Add Filter**, select the desired **Column** and **Operator** from the drop-downs, and define the **Filter Value.**
  - *In the above screenshot, the Report Filter will ensure **only active employees** display.*

- The **Operator** options are dependent upon the **Column** selected.

- A list of all the Operators:

= (Equal)	**>=** (Greater Than or Equal)
Like	**<** (Less Than)
!= (Not Equal)	**<=** (Less Than or Equal)
> (Greater Than)	**In** (Includes)
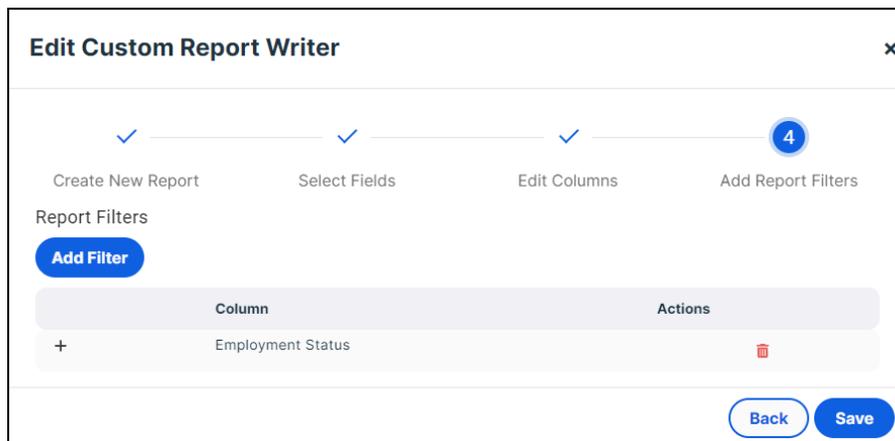
Select *Done* after each new filter. They will be visible with an option to delete (trashcan) each filter.

Select *Save* to finish the report.

Previewing Reports

To Preview Reports, select the *Eye* icon located next to the desired report.

The *Eye* icon will give you the following pop-up box.

Legal drop-down is used to select a legal company if there is more than one.

As Of Date is used to create a report based on the date entered. If left blank, any accumulations on the report will be based on the current system date.

> *Employee data, such as names, addresses, etc., will display the current values in the database as long as the As Of Date is blank.*

Pay Groups select the applicable option if there are multiple.

Payroll drop-down lists all payrolls processed, allowing the report to be run for a specific pay date.

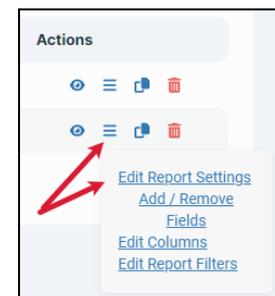**Output Type** drop-down is used to select the format for the report.
> *The default is PDF.*
> *Excel is the other option.*

Report Preview

Select *Run Report,* and a new PDF window or Excel file will open. Review the newly created custom report for errors and discrepancies. If there are none, you have finished the custom report!

💡 *If all columns are not visible, close the report; select the menu icon to edit the custom report.*

Scheduling Reports for your Payroll Package

If you would like your report delivered with your payroll package, please contact your Payroll Support Team. They can add your custom report to your payroll package, or you can run the report when needed in *Custom Report Writer*.

What are the limitations of Report Writer?

Report Writer can do many things, but below are a few things it cannot do.
- ACA Reporting
- Certified Payroll Reports
- General Ledger Reports
- Job Costing
- Labor Allocation
- Positive Pay File Reports
- Date Range reports with wages
- Workers' Compensation rates cannot be pulled in

Need assistance?

Please contact your Payroll Support Team at 1-877-729-2968.