Editing, Creating, and Filtering Report Templates

Overview

The Manager Access Reporting tool enables you to create custom templates by editing existing report templates or creating new templates. The information you can include in your custom templates depends on the Manager Access rights assigned to you by an administrative user. To sort and search your template and report lists, you can apply filters.

Report Planning Steps

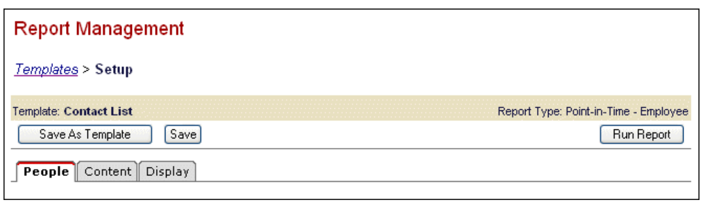
Here are some questions to consider when creating a custom template.

1. Briefly describe the goal of your report. What do you want to show?
2. What name will you give the report?
3. Which default template will you use as the basis for your report? Or will you start with a custom report?
4. Do you want to filter the report to include only your direct reports or your entire down line?
5. Which fields will you include in your report?
6. How do you want to display the employees' names in the report?
7. How do you want to sort your data?

The Templates Setup Page

When you select the option to create a new report or template, or when you edit an existing template, the Templates Setup page displays. On this page, you select the report criteria, content, and display options. The options you select will answer the following questions:

- Whose names should appear on the report?
- What data should appear on the report?
- How should the names display on the report?



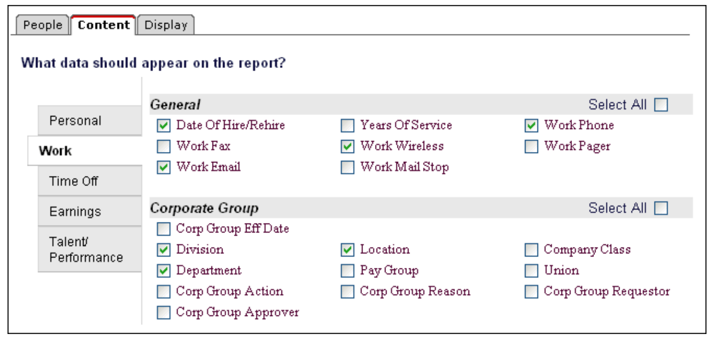
Elements and Descriptions

The Templates Setup page contains a link, buttons, and tabs. The following table describes each element.

Element	Description
Templates link	Click to return to the Report Management page
Save as Template button	Click to open the Save as Template window. You can save a new template or overwrite an existing template.
Save button	Click to save your changes to the existing template. **Note:** This option is only available when editing an existing template.
People tab	Click to select the report criteria (who should appear on the report).
Content tab	Click to select the report contents (the fields that display in the report).
Display tab	Click to select the report display options (how the names display on the report).
Run Report button	Click to run the report without saving the template.

The Templates Setup Page, Content Tab

The Content tab contains five pages: Personal, Work, Time Off, Earnings, and Talent/Performance. You click the page you need and select the fields you want to include in your report. The report results will display all the fields selected on each of the five pages.



Content Tab Pages and Descriptions

The following table describes each Content tab page.

Page	Description
Personal	Select report fields related to personal identification and personal information.
Work	Select report fields related to general work information, status, job information, and corporate groups.
Time Off	Select report fields related to employee time off information such as accruals, time taken, balances, and projected carryover.
Earnings	Select report fields related to employee earnings and compensation action information.
Talent/ Performance	Select report fields related to performance management and talent records (awards, education, licenses/certifications, prior work experience, professional affiliations, skills, and training).

Historical Reports and the Work and Earnings Pages

When running a historical report, the Work and Earnings pages will allow you to include historical data for effective-dated fields, such as job titles and earnings within a specified date range. Historical reports show all the changes made to the selected fields between two points in time.

If you select historically tracked fields (indicated by a white H in a red square) on the Work and Earnings pages, you will display all changes made to those fields during the date ranges you specify. If you select other fields, you will display their values in the system on the report request date.

The following illustration depicts the way in which historically tracked fields display on the Content > Work page.

The Content tab > Work and Earnings pages contain several historically tracked fields (not just the fields in the preceding illustration).

Editing a Report Template

You can create a custom template by editing an existing report template in the All Templates or Favorite Templates lists. Use your custom template to run a single report or save it as a template and use it to run multiple reports as needed.

Instructions

The following table explains how to create a custom template from an existing report template and add it to the Favorite Templates list.

Click here or navigate to https://support.adp.com/hrb/manager.html to view a simulation of this procedure.

Step	Action
1	Point to the **Reports** section and select **Report Management**.
2	From the All Templates or Favorite Templates list, select the template you want to edit.
3	Click **Edit Template**.
4	Select the People, Content, and Display tabs to make your edits to the template as necessary.
5	When your edits are complete, click **Save as Template**.
6	In the **Save the Template with This Name** field, enter the name you want to assign your custom template. **Note:** If you do not enter a new name for your custom template, you will overwrite the original template with your edited version.
7	If you want to display your custom template in the Favorite Templates list, select **Add the Template to My Favorites**.
8	Click **Save as Template**. **Result:** A success message displays.

Creating a New Report Template

You can also create a new custom template instead of editing an existing one.

Instructions

The following table explains how to create a custom template:

Step	Action
1	Point to the **Reports** section and select **Report Management**.
2	In the Create a New Report/Template section, Report Type list, select a report type.
3	Click **Create**.
4	Follow steps 4–8 in the Editing a Report Template instructions to complete the process.

Important Information

- Unlike the Reports Bin, the All Templates list allows you to store an unlimited number of templates.
- The custom templates you create display only for you.

Best Practices

- Periodically review the All Templates list and delete the custom report templates you no longer use. The list can become lengthy and cumbersome to use if you retain unused templates.
- It is not necessary to save a template if you only need to run your report once or if it takes a short time to edit an existing template. Instead, run the report. Retrieve your report results in your Reports Bin.

Filtering Templates

A filter is available in the All Templates list and the Reports Bin to help you sort and search your templates and reports.

Instructions

The following table explains how to filter your All Templates list and then refresh your view to display all the available templates.

Step	Action
1	Point to the **Reports** section and select **Report Management**.
2	In the All Templates/Filter By list, select the value by which you want to filter.
3	In the blank field or list that displays to the right of the Filter By list, select the applicable value or enter the applicable text.
4	Click **Filter**. **Result:** The All Templates list displays the filtered results.
5	Click **Show All**. **Result:** All saved report templates display in the All Templates list.