

## Using the Advanced HR 2.0 Standard Reports

There are two ways to run reports in Advanced HR 2.0:

### Two methods to run reports in Advanced HR:

#### 1 | Standard Reports

The system comes with a full set of standard reports out of the box.

#### 2 | Quick Report Writer

The Quick Report Writer (QWR) lets you create customized reports.

► You can run **Standard Reports**

The system comes with dozens of reports right out of the box. These reports cover everything from Achievement Lists, New Hire Lists, to Worker's Comp Types.

► Create Custom Reports (using the **Quick Report Writer**).

The Quick Report Writer allows users to select parameters (known as Concepts) to incorporate into a custom report.

This article discusses how to use the Standard Reports.



Advanced HR 2.0 has a library of standard reports that users with Base Manager roles or higher can run by clicking on the green arrow icon to the left of the report. Standard Reports cover everything from Achievement Type Lists, New Hire Lists, to Workers Comp Types.

Standard Report List						
Actions	Name	Description	Category	Active	Available To	
	Absence Types	Absence Types List Report	Company Setup	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	SuperAdmin	
	Achievement Types	Achievement Types List Report	Company Setup	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	ManagersAndAbove	
	Audit List	Full List of Audit records for the specified date range - including system and setup records.	Internal System	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	AdminsAndAbove	
	Certificate Types	Certificate Types List Report	Company Setup	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	ManagersAndAbove	
	Compensation Change Reason	Compensation Change Reason List Report	Company Setup	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	ManagersAndAbove	
	Compensation History	Organizational Structure, Compensation Effective Date, Employee Name, Employee Type, Position, Supervisor, Pay Type, and Pay Rate as of the report effective date (defaulted to today). The Effective Date, Pay Type, Change Reason, Comment and Rate will also be displayed for any previous compensation changes for each employee with multiple compensation history records.	Compensation	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	AdminsAndAbove	

Go to **HR Admin – Reporting - Standard Reports** to view the available Reports. The Standard Reports are organized alphabetically.

**Note:** Some reports are listed as **Internal System Report**. These reports are only available to Admins and above roles.

The following table describes the fields and buttons on the **Standard Report List** screen.

Field / Button	Description
<b>Actions:</b>	The <b>Actions</b> column options are:
Execute Report	Click this option to run the report and set the report properties depending on the type of report. Displays the <b>Set Report Properties</b> screen, see below.
<b>Name</b>	The name of the report.
<b>Description</b>	The description of the report.
<b>Category</b>	The category of the report; for example: <b>Company Setup, Employee, Compensation, etc.</b>
<b>Active</b>	A read-only toggle switch indicating whether this report is active or not.
<b>Available To</b>	<p>The level of access you want to require (in other words – the roles) to which this report is available; for example: <b>SuperAdmin</b>.</p> <p>On the Report details screen, you can select from the following options:</p> <ul style="list-style-type: none"> <li>• All</li> <li>• Managers and Above</li> <li>• Admins and Above</li> <li>• Super Admins</li> </ul>

**Report Available To**

SuperAdmin

Please Choose (represents BLANK)

All

ManagersAndAbove

AdminsAndAbove

SuperAdmin

### Executing the Report

In the **Actions** column, for each report, click on the green arrow



(hover the cursor over the arrow to see that this is the **Execute Report** option). Click on the green arrow and you may be able to set the report properties depending on the type of report you are running. If so, the system displays the **Set Report Properties** screen.

## Set Report Properties

**Audit List**

Set Report Parameters

Assign your parameters that will be used in the report execution.

Company\* Relative Date Type

Brown's Auto Supply (BAR) (WEB1200) Please Choose (Represents BLANK)

Effective Date

10/11/2019

Confirm and Click

Confirm your information and click below.

**▶ EXECUTE REPORT**

- You can only select one **Company** at a time.
- The **Relative Date Type** is a date range for the report (Previous Month, Current Month, etc.)
- The **Effective Date** is the start or end date for the report. It may default to today but can be changed.

The Report that is generated will display as a sortable Report that can be saved as a PDF, .csv, Excel, TIFF etc. file.

**Audit List**

**Audit Detail**  
*Brown's Auto Supply (BAR)*  
*All Employees As Of 10/11/2019*  
*Changes Between 9/1/2019 and 9/30/2019*

Date	Company	Affected Employee	Area	Change Type	Field	User Name	Transaction
9/10/2019	Brown's Auto Supply (BAR)		User/Company Exclude Link	Delete	Link	mike.blake@asuresoftware.com	20190910175056324
		<b>Previous Value:</b>	cplkpfmev@sharklasers.com/Brown's Auto Supply (BAR)				
		<b>New Value:</b>	[Blank]				
9/10/2019	Brown's Auto Supply (BAR)		User/Company Exclude Link	Insert	Link	mike.blake@asuresoftware.com	20190910175037965
		<b>Previous Value:</b>	[Blank]				
		<b>New Value:</b>	cplkpfmev@sharklasers.com/Brown's Auto Supply (BAR)				
9/6/2019	Brown's Auto Supply (BAR)		User/Company Link	Insert	Link	kayla.tanach@asuresoftware.com	20190906180629630
		<b>Previous Value:</b>	[Blank]				
		<b>New Value:</b>	ktest@sharklasers.com/Brown's Auto Supply (BAR)				

Record Count: 3

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**Effective Date**  
10/11/2019

**Relative Dates**  
Previous Month  
Current Month  
Current YTD  
Current Full Year  
Next Month  
Next 2 Months  
Next 3 Months  
Next Year  
Previous YTD  
Previous Year  
Current Quarter  
Next Quarter  
Previous Quarter  
Previous Day  
Today  
Tomorrow

**Employee Name**  
clear selection

Preview

On the generated report is a toolbar at the top of the screen.


Use the toolbar to navigate through pages as well as printing the report.

Some reports may have additional filters in the Set Report Properties screen, such as the Expiring Achievements report.

These reports will have additional filters on the right side of the generated report screen itself.

# Expiring Achievements

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### Expiring Achievements

*Brown's Auto Supply (BAR)*  
*Active Employees As Of 8/29/2018*  
*Sorted By Expiration Date*  
*Expiring Between 8/1/2018 and 8/31/2018*

Expiration	ID	Name	Description	Awarded	Supervisor
Employee Count: 0					

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**Employee Status**  
Active  
In-Active  
clear selection

**Effective Date**  
8/29/2018 

**Sort Order**  
Expiration Date  
Employee Code  
Last Name  
Awarded Date  
Supervisor Last Name  
Division  
Branch  
Department  
Team

**Achievement Description**  
Five Years of Service  
Ten Years of Service  
Employee of the Quarter  
Achieved 2 Million in sales  
Employee of the Year  
clear selection

**Relative Dates**  
Previous Month  
Current Month  
Current YTD  
Current Full Year  
Next Month  
Next 2 Months

**Tip:** Make sure that in your Browser's settings, that pop-ups are allowed. Some Browser's may have a setting where a pop-up blocker is on by default; if so, make sure the pop-up blocker has been disabled.