

Creating Custom Reports with the Quick Report Writer (QRW) Tool

The **Quick Report Writer (QRW)** is a tool that allows you to create customized reports on selected data within Advanced HR 2.0. The Quick Report Writer allows the user to select parameters (known as **Concepts**) to incorporate into a custom report. In addition, you can save the Custom Report you create to be generated in the future.

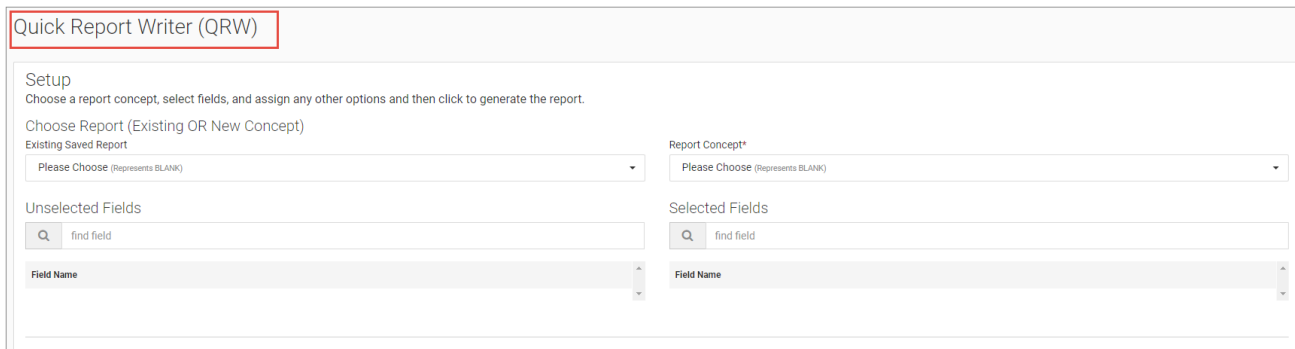
Note: If a user creates a custom report, the report is associated with that user. The report cannot be run by another user, it is user-specific; the report is not saved globally.

To create a custom report in Advanced HR 2.0:

Go to **HR Admin - Reporting - Quick Report Writer**.



The system displays the **Quick Report Writer (QRW)** screen.

A screenshot of the 'Quick Report Writer (QRW)' setup screen. The screen has a title bar 'Quick Report Writer (QRW)'. Below the title bar, there is a 'Setup' section with the instruction 'Choose a report concept, select fields, and assign any other options and then click to generate the report.' There are two main sections: 'Choose Report (Existing OR New Concept)' and 'Report Concept*'. Under 'Choose Report', there is a dropdown menu labeled 'Existing Saved Report' with the text 'Please Choose (Represents BLANK)'. Under 'Report Concept*', there is a dropdown menu labeled 'Please Choose (Represents BLANK)'. Below these are two sections: 'Unselected Fields' and 'Selected Fields'. Each section has a search box with a magnifying glass icon and the text 'find field'. Below the search boxes are two dropdown menus labeled 'Field Name'.

You can select an **Existing Saved Report** to use or create a new report. The next step is to select the **Report Concept**. The concept you choose will dictate which fields are automatically selected for the report. For example, if you select **Benefit Details**, Advanced HR selects fields that relate to benefits as you can see in the screenshot on the right below.

Quick Report Writer (QRW)

Setup
Choose a report concept, select fields, and assign any other options and then click to generate the report.

Choose Report (Existing OR New Concept)
Existing Saved Report

Please Choose (Represents BLANK) Report Concept*
Benefit Details - CONCEPT

Unselected Fields

Field Name

First Name	➔
Last Name	➔
Payroll Deduction Frequency Code	➔
Employee Withdrawal Date	➔
MemberNumber	➔
Employee Election Notes	➔
Employee Life Event Reason	➔

Selected Fields

Field Name

Company Name	🗑
Company Code	🗑
Display Name	🗑
Employee ID	🗑
Monthly Employee Contribution Amount	🗑
Employee Contribution Percentage	🗑
Monthly Employer Contribution Amount	🗑

The **Report Concept** field values you can select from include the following:

- Achievements
- Alternate Rate
- Applicants
- Benefits
- Benefits - Details
- Certificates
- Classes
- Compensation
- Direct Deposit
- Education
- Emergency Contacts
- Employee
- Labor Allocation
- Licenses
- Position / Organization
- Reviews
- Skills

Note: You can only select one **Report Concept** for each custom report but it's important to note that each **Report Concept** has a set of **Selected Fields** that will be included in the report by default. See the screenshot below.

Advanced HR will also display a list of “**Unselected Fields**” (for each Concept) that can be added to the **Selected Fields** list by clicking on the green arrow button to the right of the field name. You can remove a **Selected Field** by clicking on the red trash can icon.

For the **Licenses, Classes, Certifications, and Review** concepts, there is an **Email Acknowledged** option in the **Unselected Fields** dropdown to let you report on whether the employee has acknowledged these emails. For example, in the **Classes Concept** list of **Unselected Fields** shown below:

Quick Report Writer (QRW)

Setup
Choose a report concept, select fields, and assign any other options and then click to generate the report.

Choose Report (Existing OR New Concept)
Existing Saved Report
Please Choose (Represents BLANK)

Report Concept*
Benefit Details - CONCEPT

Unselected Fields
find field

Field Name	
First Name	➔
Last Name	➔
Payroll Deduction Frequency Code	➔
Employee Withdrawal Date	➔
MemberNumber	➔
Employee Election Notes	➔
Employee Life Event Reason	➔

Selected Fields
find field

Field Name	
Company Name	🗑
Company Code	🗑
Display Name	🗑
Employee ID	🗑
Monthly Employee Contribution Amount	🗑
Employee Contribution Percentage	🗑
Monthly Employer Contribution Amount	🗑

Once you have selected the fields for your report, you can adjust the basic settings which include:

1. Select the **Company** you want to report on or **ALL** companies if you have access to more than one.
2. Report on **Active, Inactive, or All** employees. The default is **YES**, to report on Active employees.
3. Which field you want the report to sort on and in which order (ascending or descending).

Note: Employee ID is actually an alphanumeric field, so it does not respond as expected when used as a sort direction field. If you want to sort a report by Employee ID, it is best to do this after exporting the report into Excel.

Settings

Company
Brown's Auto Supply (BAR) (WEB1200)

Include Active Employees
NO ALL **YES**

Order Report By
Please Choose (Represents BLANK)

Order Direction
Ascending (Low To High)

Filtering
Use only 1 of Simple OR Advanced
Simple Filter
simple filter

Advanced Filter

Field 1
Please Choose (Represents BLANK) = enter value

Field 2
Please Choose (Represents BLANK) = enter value

Field 3
Please Choose (Represents BLANK) = enter value

Field 4
Please Choose (Represents BLANK) = enter value

You can also set simple or advanced filtering. A *simple filter* can contain multiple criteria as the example below demonstrates.

Simple Filter

Q Billing Clerk Accounting

Position Title	Supervisor 1 Display Name	Org 1 Desc	Org 2 Desc	Org 3 Desc
Billing Clerk		Las Vegas	Accounting	
Billing Clerk		Arizona	Accounting	
Billing Clerk		Idaho	Accounting	
Billing Clerk		Las Vegas	Accounting	

An *advanced filter* can be used to perform date and numerical comparisons, either alone or in conjunction with a simple type of search. In the following example we filtered first by hire date less than or equal to 12/1/2016 and a location of Las Vegas.

Field 1 Position/Organization Effective Date - (field) <= 12/1/2016

Field 2 Org 1 Desc - (field) = Las Vegas

Position/Organization Effective Date	Position/Org Reason Desc	Position Title	Supervisor 1 Display Name	Org 1 Desc	Org 2 Desc
04/14/2016		Sales Consultant		Las Vegas	Operations
01/15/2016		Billing Clerk		Las Vegas	Admin
11/26/2014		Accountant		Las Vegas	Accounting
11/19/2014		Executive Management		Las Vegas	Admin

Recently added comparison operators include **Not Equal (<>)** and **Not Like**, as shown in the following screenshot.

Advanced Filter

Field 1
Please Choose (Represents BLANK) [v]

Field 2
Please Choose (Represents BLANK) [v]

Field 3
Please Choose (Represents BLANK) [v]

Field 4
Please Choose (Represents BLANK) [v]

Description
Description

= [v]
 [input type="text"/>
 =
 Like
 Not Like
 >
 <
 >=
 <=
 <>

enter value

enter value

enter value

enter value

You have four options for generating the newly created Report:

- **Save/Update Report Configuration.** If you save the report you must give it a **Name**.
- **Delete Report Configuration**
- **Output to Screen** - Output the report to your computer screen.
- **Output to CSV** - Output the report to a CSV file.



Sample Custom Report

Here is a sample QRW custom report using the **Employee** Concept and including the following fields: **Company Name** and **Code**, **Employee ID**, **First Name**, and **Last Name**.

Generated Report						
Record Count = 32						
Company Name	Company Code	Display Name	Employee ID	Active	Birthdate	
Brown's Auto Supply (BAR)	WEB1200	Couture, Thomas	1	True	04/17/1982	
Brown's Auto Supply (BAR)	WEB1200	Brown, Stephen	2	True	12/28/1959	
Brown's Auto Supply (BAR)	WEB1200	Mitchell, Rob	3	True	05/11/1967	
Brown's Auto Supply (BAR)	WEB1200	Jones, Edward	4	True	09/16/1985	
Brown's Auto Supply (BAR)	WEB1200	Perry, Jackson	5	True	11/13/1962	
Brown's Auto Supply (BAR)	WEB1200	Last, First	OR	True	07/14/2078	
Brown's Auto Supply (BAR)	WEB1200	Garcia, Monique	6	True	02/02/1996	
Brown's Auto Supply (BAR)	WEB1200	Kowalski, Felix	8	True	07/13/1989	
Brown's Auto Supply (BAR)	WEB1200	Marley, Tyson	9	True	02/02/1993	

The report also provides a total Record Count.