IP4 - Running reports

To assist with tracking and monitoring HRIS recruitment and personnel, reports can be run from Discoverer Plus.

This guide covers the following process steps:

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IP4 - Running reports

Navigate to: Personnel Services > Using HRIS > System Availability & Login

Logging in

1. Click on

under Discoverer. The *Log in window* opens:

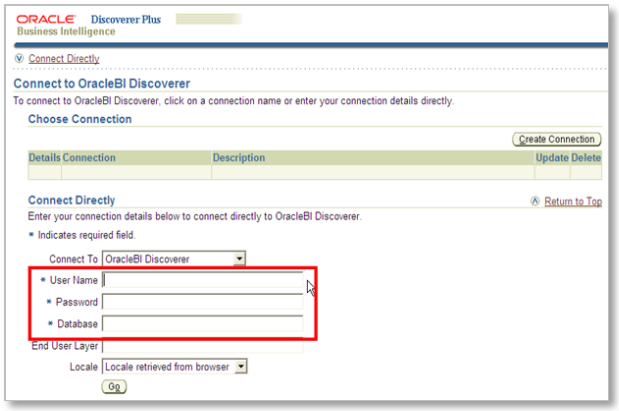
2. Enter your **Username** (this will be the same as your Oxford Username e.g. admn1234).

3. Enter your **Password**.

4. Enter hrisprd into the **Database**

5. Click

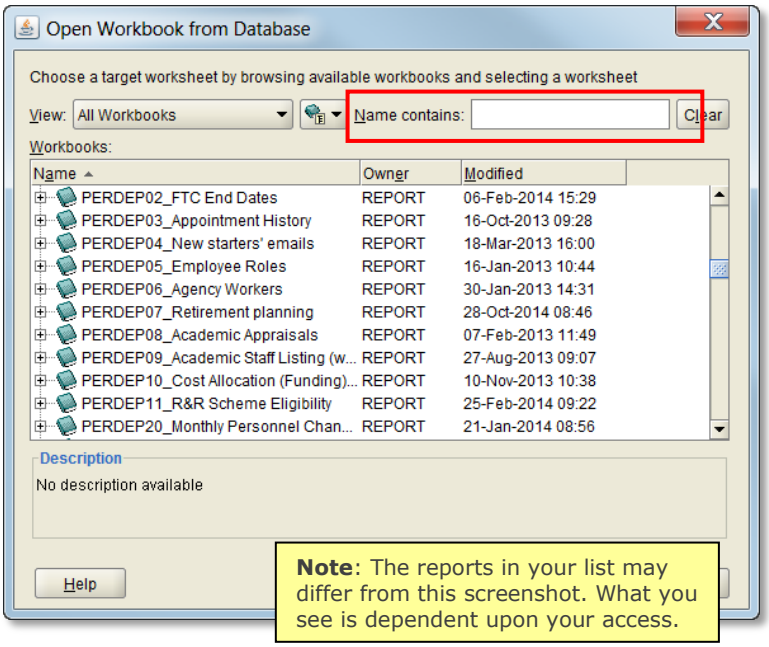
.



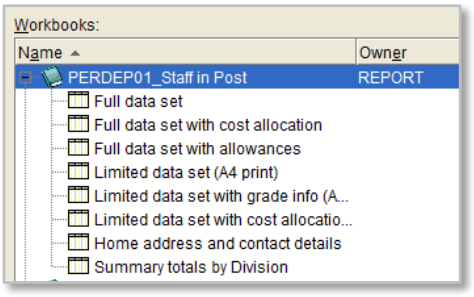
Selecting and running reports

1. To help reduce the length of the list, enter part of the report name into the **Name contains** field e.g. enter REC to find recruitment reports. Select

to return to the full list of reports.



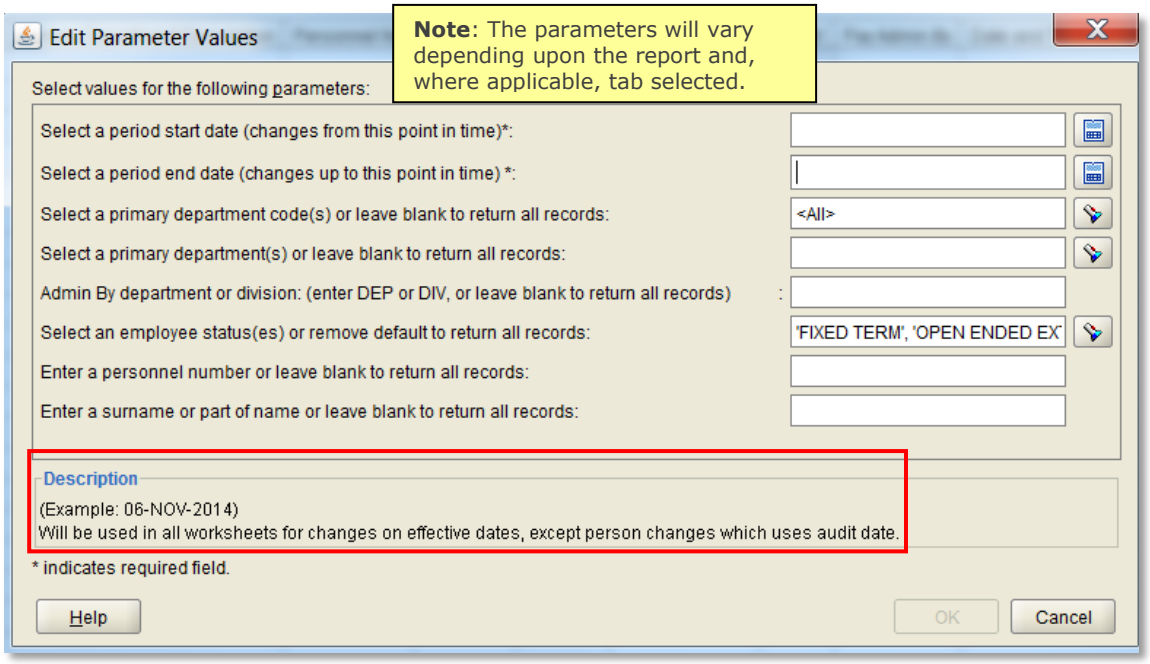
2. Where a report has multiple tabs, double click on the report name or click on the **+** to display the list of individual tabs.



3. Highlight the required report/tab and click Open.

Note: If you do not specify a tab when you select a report and it has multiple tabs, the report will open on the tab which was run last. If you have not previously run that report and you do not select a tab, it will default to run the first tab.

4. The *Edit Parameter Values* window opens:



If a value(s) is mandatory it will be indicated by an (*). If a value is not mandatory you can leave the field blank to include all values.

Some parameters can be entered manually e.g. a two character department code. Dates can be entered by clicking on the calendar icon.

The **Description** area may provide further information when you click into a parameter (see example above).

Note: If you only want to export the data to Excel and not review it first, it is not necessary to enter the parameters at this point. Select **Cancel**. You will be prompted to enter the required parameters during the export process.

5. Enter the required parameter/s or (if shown) click on to choose from a list of values.

If you click on , the *Select Values* window will open. Items displayed in the **'Selected values'** box will appear in the report. To edit the selection:

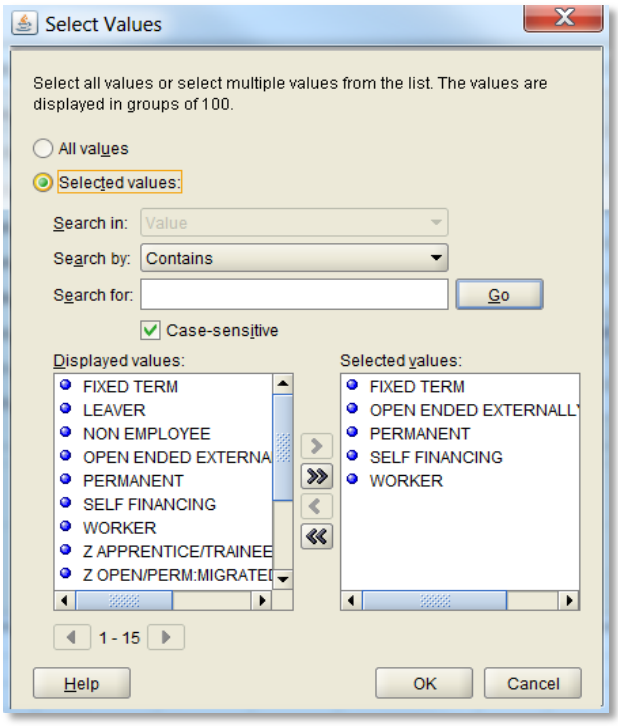
a) Click on '**Selected values'**.

b) To find a specific value, use the **'Search for'** box. Items displayed in the **'Selected values'** box will appear in the report.

c) To move an individual item select the value and then click on the single arrow to select or de-select as required.

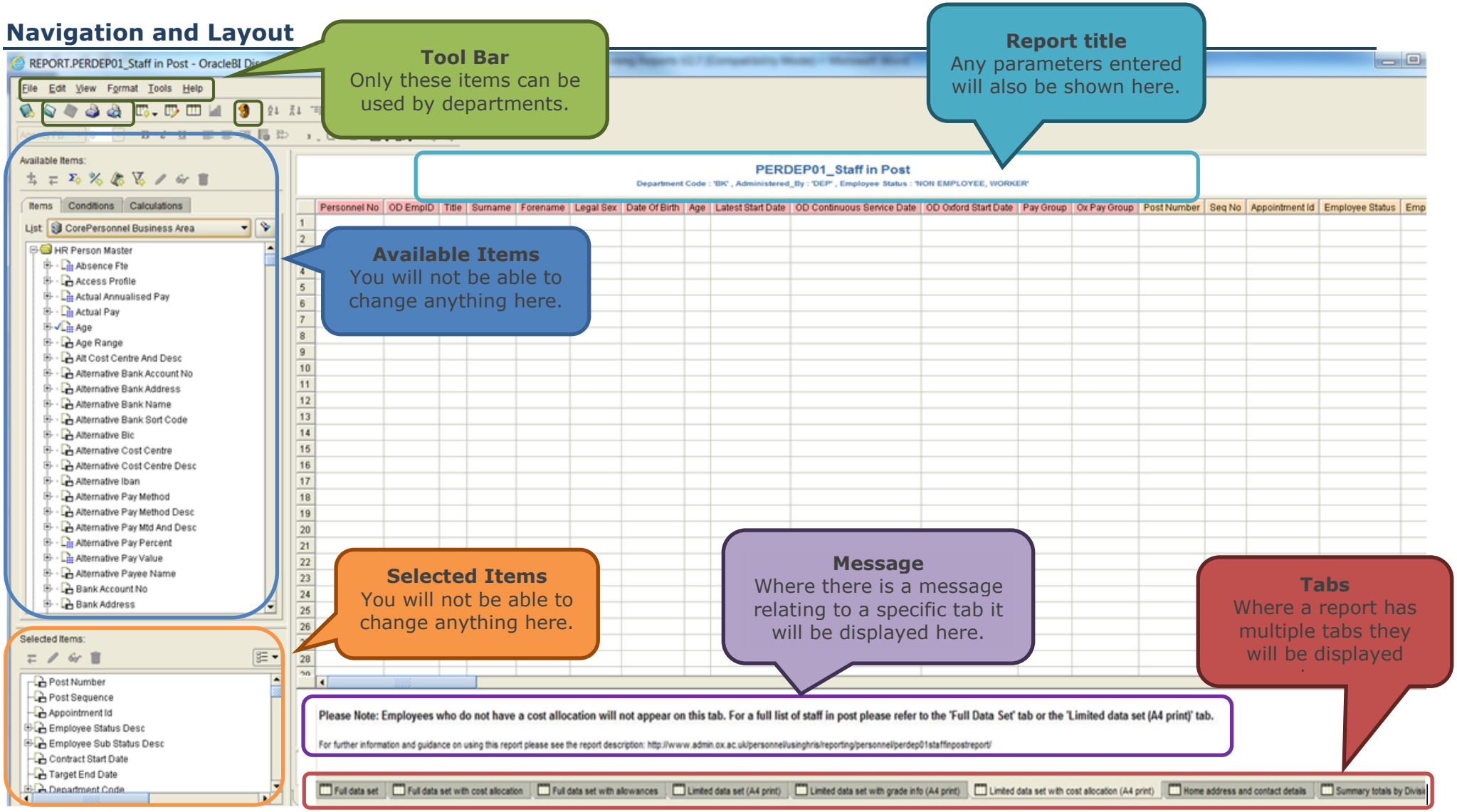
d) To move all items between the **'Displayed values'** and the **'Selected values,** boxes, click on the double arrows.

e) Click OK or 'Enter' to run the report.



IP4 - Running reports

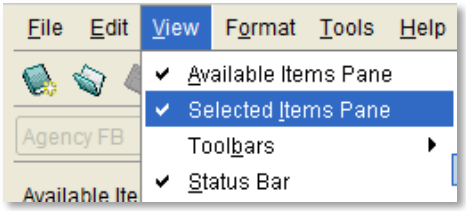
Navigation and Layout



Removing the 'Available Items' and 'Selected Items' panes

To see more of the columns in your report you can remove the **Available Items** and **Selected Items** from your screen view:

- From the toolbar select **'View'** then un-tick the two items.



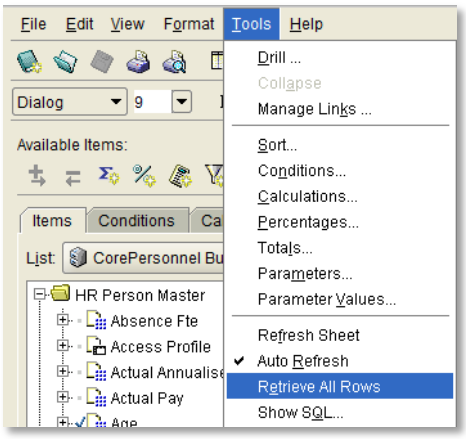
Expanding the report

Where a report contains more than 250 rows you may need to expand it to include all rows. There are two ways to do this:

1. At the bottom of the worksheet you will have the option to click on ▼ to retrieve the next 250 rows.

Note: If your report is likely to return more than 500 rows, follow step 2.

2. Go to **Tools > Retrieve All Rows**. This will return **all** rows for the parameters you have selected.



Note: If you are exporting the report and do not want to review it first you do not need to expand the rows. All rows will be exported.

Working with parameters and filters

Viewing and refreshing parameters

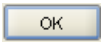
1. To view the parameters that you have selected once you have run a report you can either:

   a) At the top of the report beneath the report name the parameters you have entered will be displayed. These details will also be displayed at the top of the page if you export the report to Excel.

   OR

   b) Click on . The *Edit Parameter Values* window will open and the parameters you entered to run the open report will be visible.

2. To change the parameters on an open report click on . The *Edit Parameter Values* window will open.

3. Enter the new parameters and click on 

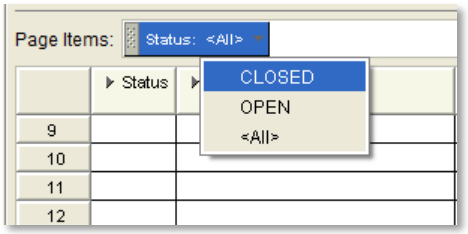
or 'enter' to run the new report.

Page Items

Some reports include **'Page Items'** which allow you to filter the data returned in the report.

1. Click on the button next to **'Page Items:'** to view the list of options.

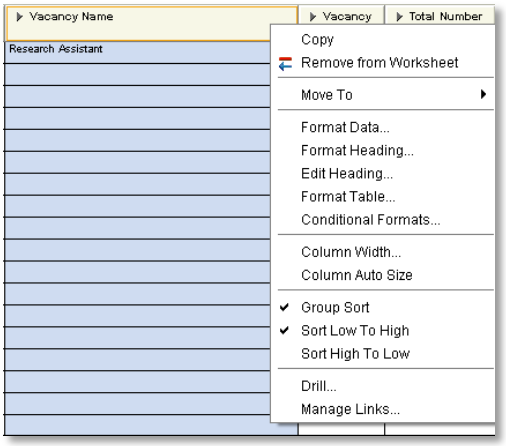
2. Click on the option you require and the report will refresh to return the filtered data.



Group sort

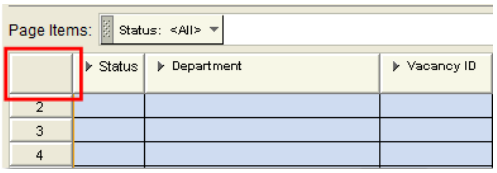
Some reports are sorted on certain data items to 'group' the data under specified headings. This makes the data easier to view on screen but if you are going to export the report to Excel you may wish to remove the group sort. This will make it easier for you to enhance the data by adding pivot tables and/or filters for example.

1. To remove the group sort from a single column, right click on the relevant column. The menu shown will appear:

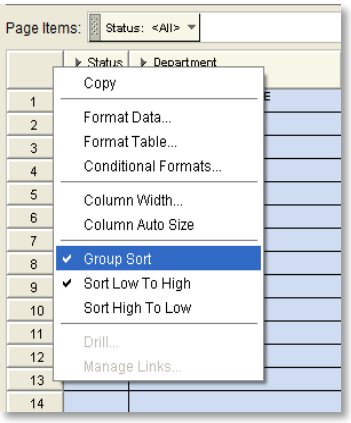


2. Click on '**Group Sort'** to de-select. The data will then appear in every row.

3. To remove the group sort from all columns in the report, click on the area shown. The entire sheet will be highlighted in blue:



4. Click on **'Group Sort'** to de-select and wait for the report to refresh.

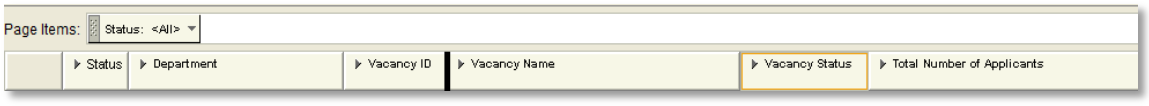


Note: If you have already de-selected group sort on a single column you will need to re-select then de-select in order for it to apply to the entire sheet.

Re-ordering columns

In some reports you can re-order the columns in Discoverer:

1. To move a column, click on the column heading and while holding the left mouse button down drag the column across. The thick black line shows where the column will be moved to:

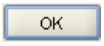


2. Release the mouse button and wait for the report to refresh. The column has now moved.

Opening a new tab

Some reports have multiple tabs for different purposes. Personnel reports have a **full data set** tab which contains all columns, and is only suitable for reviewing on screen or exporting to Excel. A **limited data set** tab contains a reduced set of columns and is intended for printing.

1. To run one of the other tabs on the report you are viewing select the tab you want to open. If the tab relies on different parameters you will be prompted to enter or select the values you wish to include in the report – see 'Viewing and refreshing parameters' on page 5 of this guide.

2. Click 

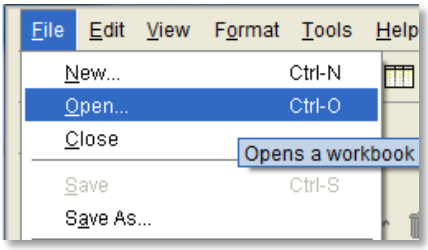
or 'Enter' to run the report.

Opening a new report

If you want to run a new report you can do so without exiting or closing the existing report.

1. Go to **File > Open** or click on .

2. Choose the new report that you want to run.

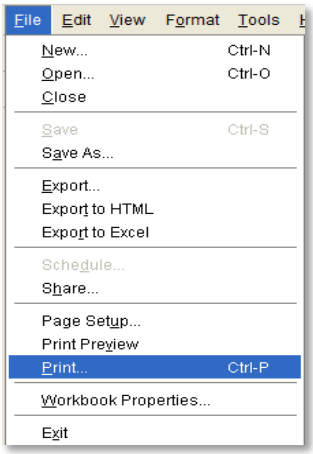


Printing and exporting reports

Printing reports

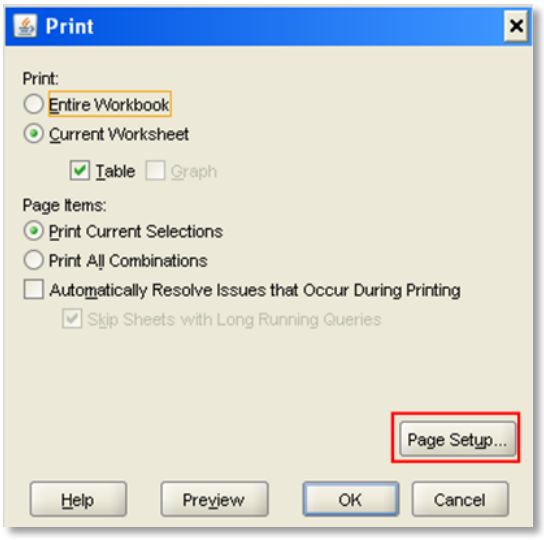
Note: If you have used **Page Filters** only the filtered data will print. Change the status back to <All> if you want to print out all the data in the report.

1. Select **File** > **Print...**



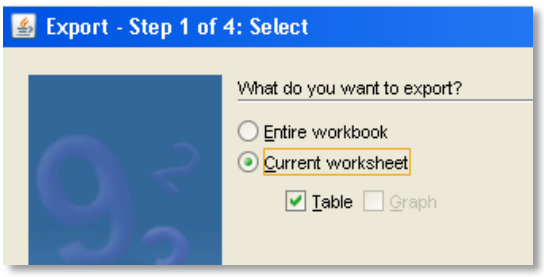
Where there is the option, ensure you are on the **Report (limited data set)** tab which is intended for printing.

1. Select 'Current Worksheet' or 'Entire Workbook' (this will print all tabs).
2. Click on Page Setup... to ensure the format is correct (it is generally advisable to change page setup to A3, landscape and adjust size to fit to 1 page wide).
3. When ready to print click OK to complete the printing process.
4. Enter or select the parameters you wish to include in the report. If a value is mandatory it will be indicated by an (*). If a value is not mandatory you can leave the field blank to include all values.
5. Click OK or 'Enter' to print the report.



Exporting reports

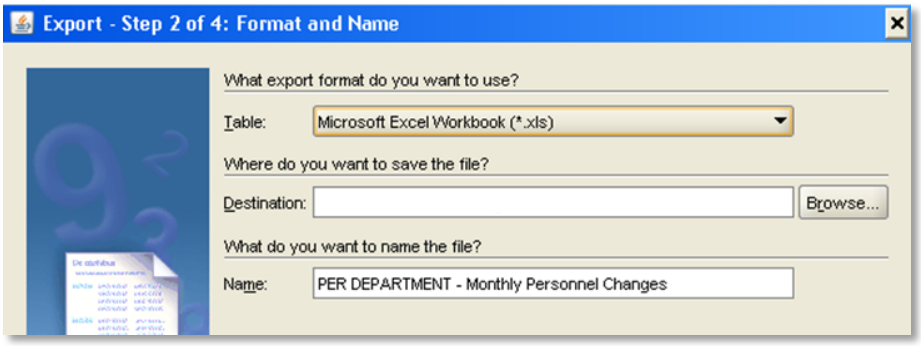
1. Select **File** > **Export...** The export wizard will open:



2. Select worksheet/workbook as required and click Next >.

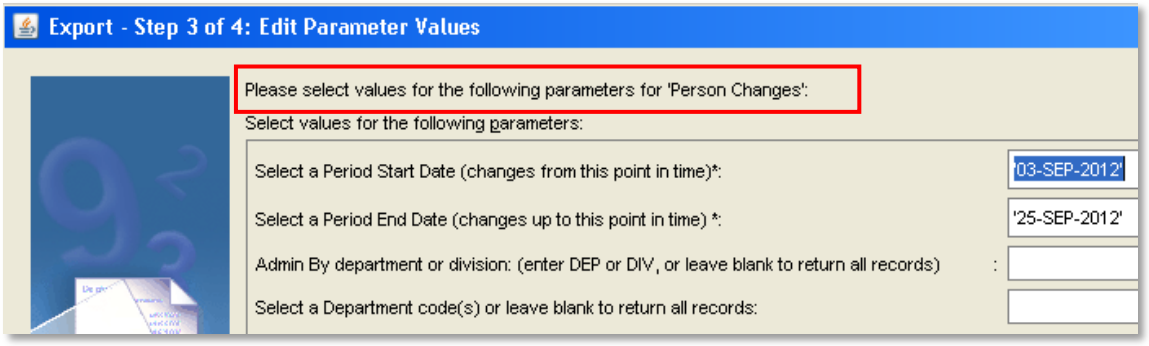
3. Specify destination, change the file name if required, then click Next >. (The file name defaults to the report name.)

Note: Data subject to the *Data Protection Act* must not be stored on your C:\ drive. You should choose an appropriate alternative location to save the report.
If you try to export the file again at a later date and save it to the same location it will ask you if it is OK to overwrite the file.

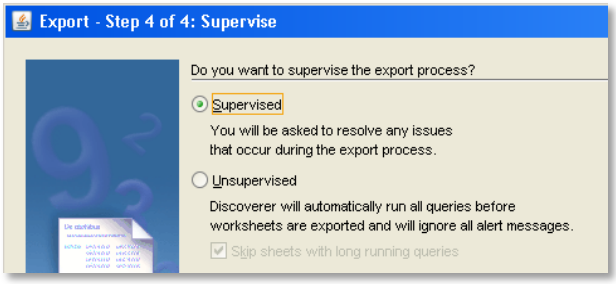


4. Enter or select the values you wish to include in the report. If a value is mandatory it will be indicated by an (*). If a value is not mandatory you can leave the field blank to include all values. click Next >.

Note: If you are exporting a file with multiple tabs and the tabs have different parameters you will need to enter the parameters for each tab. The edit parameters window will show the title of each tab (see below).

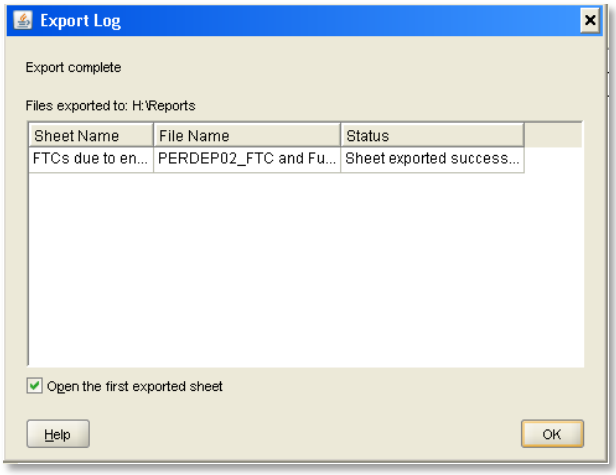


5. Finally, select the export approach (the default of "Supervised" is recommended):

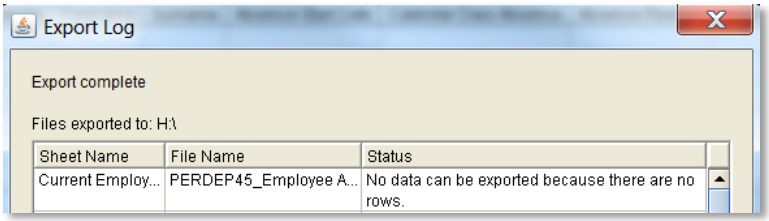


6. When the export has completed an Export Log will open:

7. Click on OK to finish



If the report has not returned any data the status column will show the comment below against each of the applicable tabs.



8. Click

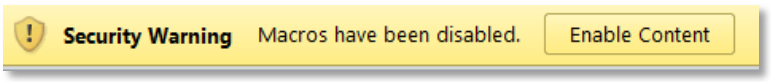
.

Note: If you have used **Page Filters** only the filtered data will export. Change the status back to **<All>** if you want to export all the data in the report.

9. Open the file in Excel.

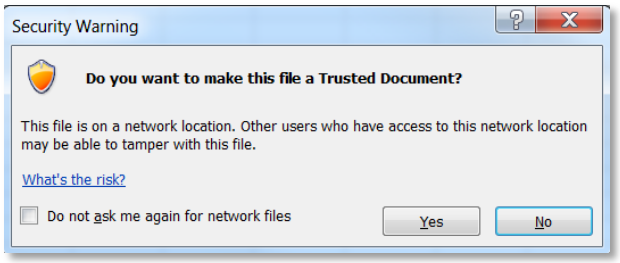
Note: Some reports contain macros to create the formatting and include colours to denote exceptions. In order to see the fully formatted report you must enable the macros.

10. You may see the following yellow security warning at the top of the sheet.



11. Click 'Enable Content' to enable the macros.

12. The following message will appear. Choose yes or no (you may need to refer to your local IT support for advice).



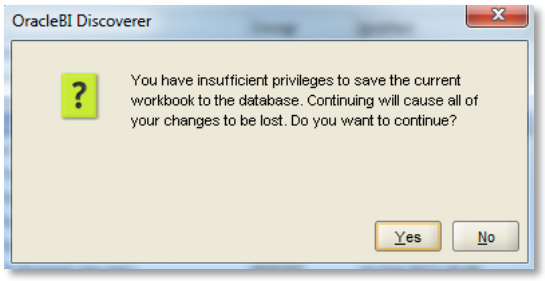
Note: It is possible that your local settings have been set up to deal with macros. If the formatting is visible then you should be able to continue. If the formatting is not visible, or you are in any doubt, speak to your local IT support to check the policy regarding macros.

Logging out

1. To close the current report select **File** > **Close**.

2. To exit Discoverer select **File** > **Exit**.

3. For both options the following message will appear:



4. Click Yes.

IP4 - Running reports

Appendix - Working with Excel

Intermediate Excel skills will be an advantage when running and exporting reports from Discoverer. Although you can make some basic changes to some reports in Discoverer there is much more you can do in Excel to enhance the layout of the report. We have included some simple tips here but if you are interested in expanding your Excel knowledge there are courses available from IT Services. Further details can be found on the IT Services website.

Please note: this is intended to be a basic guide. The HRIS Support Centre does not support Excel so if you are experiencing difficulties or need further assistance in the use of Excel please seek assistance from colleagues or contact your local IT support.

Note: We have included one method for making the changes described. We recognise that there are alternatives which you may already be using.

Hiding and unhiding columns

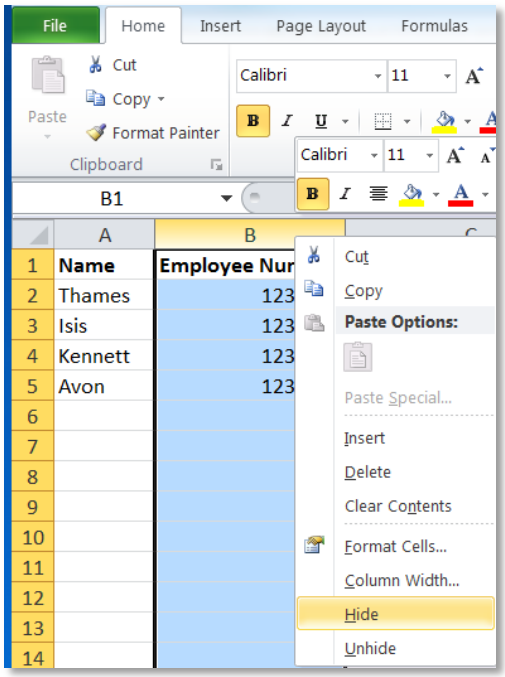
You may want to view a limited version of a spreadsheet but not remove the data completely. Hiding columns or rows enables you to remove them from view.

1. Highlight the column/s you want to hide. Click the right mouse button, choose 'hide'.

2. To unhide, highlight the columns either side of the 'hidden' column. Click right mouse button and choose 'unhide'.

Alternatively you can hover over the line between the two columns either side of the hidden column and double click the right mouse button.

You can also hide and unhide rows using the same method



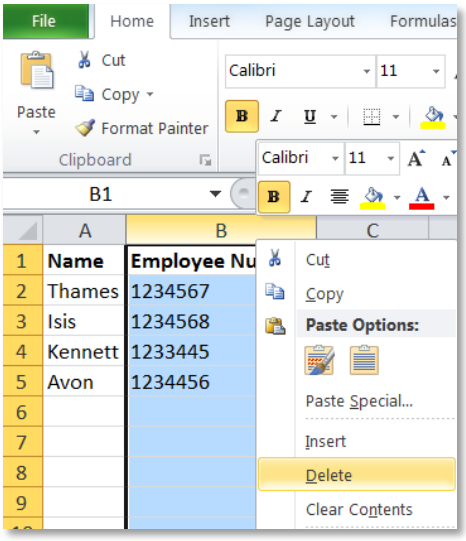
Deleting columns

If you no longer want a column included in a spreadsheet you can delete it completely. **Please note**, once saved this cannot be undone.

1. To delete a column(s) highlight the column(s) you wish to delete.

2. Click on the right mouse button and choose 'delete'.

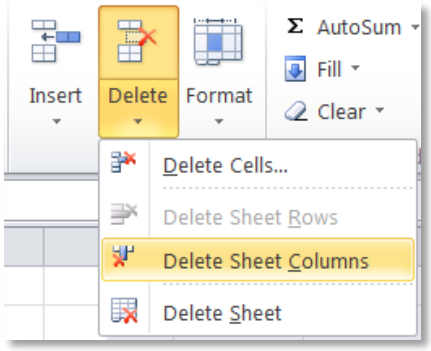
You can also delete rows using the same method.



3. Alternatively highlight the columns and from the home tab go to 'cells'.

4. Click on the downward arrow under 'Delete', choose delete > delete columns.

You can also delete rows using the same method.



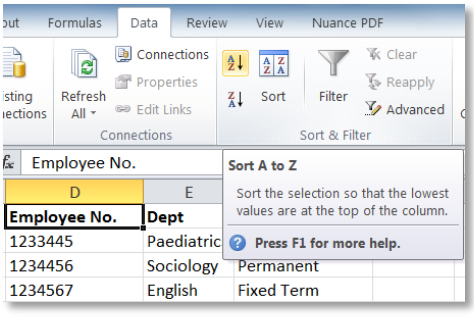
Sorting data

The order of data contained in a spreadsheet can be changed by 'sorting'. E.g. you may want to show the data in ascending order by surname or employee number.

1. In the header row click on the name of the column you want to sort then go to the 'Data' Tab and click on

or .

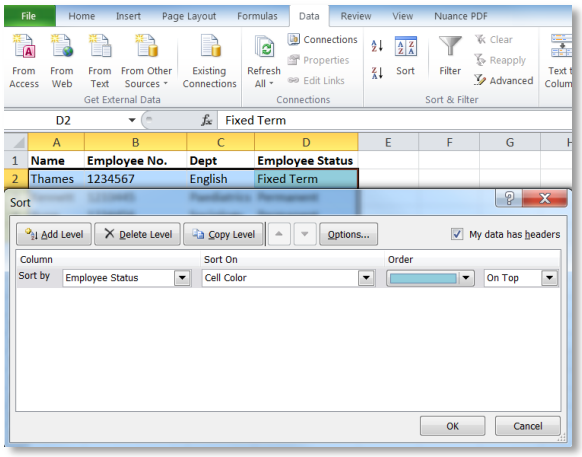
(Do not select the entire column as that will result in only that column being sorted)



2. The data will be sorted alphabetically or numerically as applicable.

To sort by colour

1. Click on any cell that contains data. Go to the Data tab and click on Sort .



2. Using the drop down menus choose the following:

   Sort By – Title of the column that contains the colour

   Sort On - Cell Colour

   Order - choose the colour you want to sort by.

3. Click

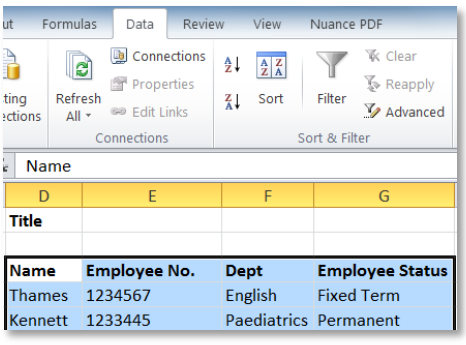
.

Filtering data

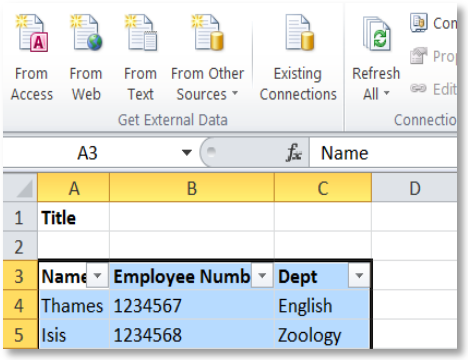
Filtering enables you to edit the view of data in a spreadsheet. For example, if you have run a report containing multiple departments, you can use the filter option to show only specified department(s).

1. Highlight the contents of the spreadsheet from the header row down - i.e. do not include any rows above the header row.

2. Go to the 'Data' tab and click on the Filter icon.



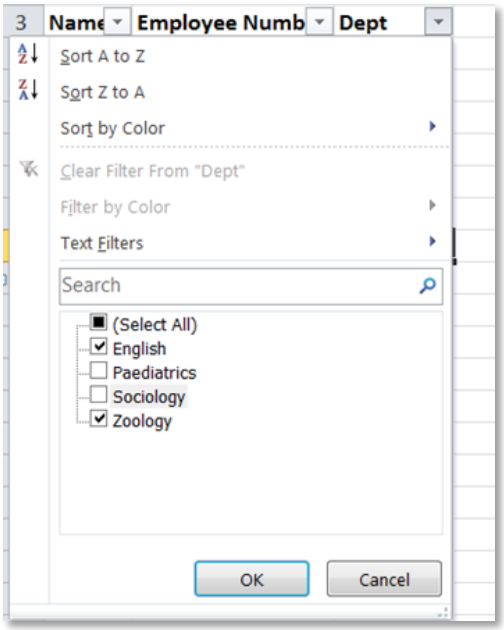
3. You will now see downward arrows in each column of the header row.



4. Click on the arrow in the column you want to filter. All of the unique items in that column will appear in a list *(alphabetically or numerically as applicable)*.

5. Un-tick any that you want to remove.

If there are multiple items and you only want to view one, untick 'select all' and then tick the item/s you want to view.)



6. Click OK.

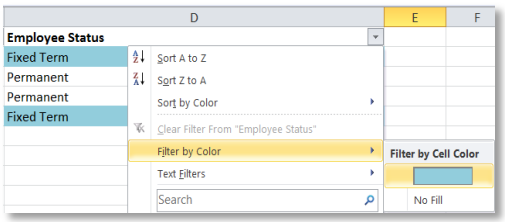
7. The column you have filtered on will now show a filtered icon .

To filter on a colour

1. Click on the arrow in the column you want to filter.

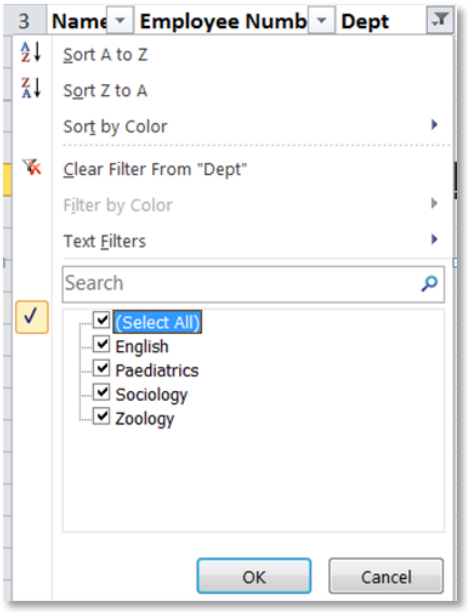
2. Choose 'Filter by Colour'.

3. Click on the colour you want to view.



4. To restore the spreadsheet to show all data, click on the , click 'select all'.

5. **Click** OK.

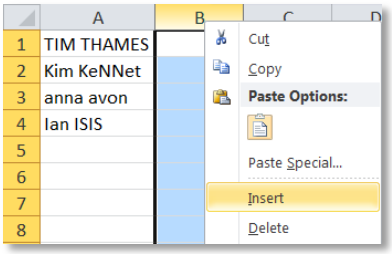


To toggle the text between upper and lower case

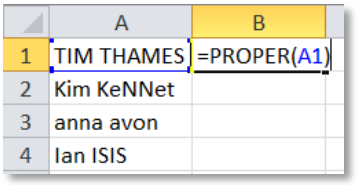
When you export reports from Discoverer the text sometimes contains a mix of upper and lower case as shown in the example. You can correct this by applying a simple formula in your excel document.

1. Insert a column to the right of the text you want to amend (right Click on the column and select **Insert**)

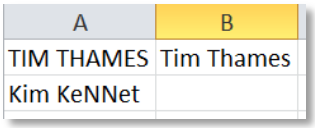
2. This will insert a new blank column.



3. Click in the first empty cell below the header row and type in the following: **=PROPER(A1)** then press **Enter.**
(A1 refers to the cell you are copying as shown in the example so if your text is in column B you would enter B1.)

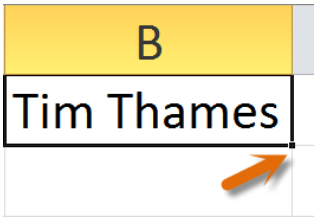


4. The text has been converted so that the first letter of each word is in capitals and the rest is lower case



5. Copy the formula down the rest of the new column.

Tip: Double click the tiny black box at the bottom right corner of the cell containing your formula.



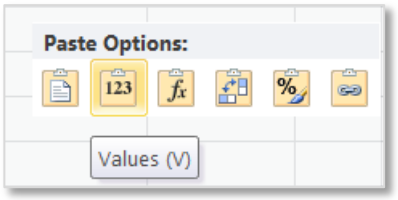
6. We suggest you now replace the formulas with normal text. **Copy** the column that you entered the formula into and **paste values** back into the same column. Nothing will appear to have happened but the column now contains the corrected text without the formulae.

7. You can now delete the column containing the mixed text. **NB**: Do not do this until you have replaced the formulae in the entire column.

Tips:

To copy and paste text you can either Right click > COPY > right click > Paste special and choose 'values'

or Right Click > COPY > right click and click on the values icon as shown below.



The method will depend upon the version of Excel that you are using.

There are other formulae that you can apply to correct the text case as follows:

= UPPER() - forces all letters to be UPPER CASE

= LOWER() - forces all letters to be lower case