



# Sage HRMS

## HR and Payroll Reports Catalog

This is a publication of Sage Software, Inc.

© 2020 The Sage **Group** plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage **Group** plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: June 10, 2020

# Contents

- Chapter 1: Introduction ..... 1
  - Support and Resources ..... 1
  
- Chapter 2: Employee reports ..... 2
  - Code table reports ..... 2
  - Compensation reports ..... 4
  - EEO reports (U.S.) ..... 7
  - Employee and organization reports ..... 9
  - Employment equity reports (Canada) ..... 10
  - Leave reports ..... 11
  - OHS reports (Canada) ..... 12
  - OSHA reports (U.S.) ..... 13
  - Pay equity reports ..... 14
  - Personal information reports ..... 15
  - Benefit reports ..... 16
  - Skill and education reports ..... 18
  - Wellness reports ..... 19
  
- Chapter 3: Time Off reports ..... 20
  - Attendance reports ..... 20
  - Time Off code table reports ..... 22
  
- Chapter 4: Payroll Reports ..... 23
  - Bank reports ..... 23
  - Employee Payroll reports ..... 25
  - General Ledger reports ..... 26
  - Government reports ..... 27
  - Sage Payroll Tax Forms and eFiling by Aatrix ..... 29

Periodic processing reports .....	29
Setup Payroll reports .....	30
Transaction reports .....	31
<b>Chapter 5: Training reports .....</b>	<b>33</b>
Catalogs and code table reports .....	33
Class administration reports .....	34
Employee training reports .....	35
Training analysis reports .....	36
<b>Chapter 6: System reports .....</b>	<b>38</b>
Audit trail reports .....	38
Data Dictionary reports .....	39
Using functions in reports .....	39
<b>Chapter 7: Using the standard reports .....</b>	<b>40</b>
Generating reports .....	40
Selecting specific employees for a report .....	44
Defining custom criteria .....	45
Printing, previewing, or exporting a report .....	48
<b>Chapter 8: Custom reporting with SAP Crystal Reports .....</b>	<b>51</b>
Creating a custom report .....	51
Custom HR reports .....	55
Custom Time Off reports .....	62
Custom Training reports .....	63
<b>Chapter 9: Sage HRMS Secure Query .....</b>	<b>64</b>
Ad Hoc Reporting Security .....	64
Using Secure Query .....	65
Creating a new query .....	66
Selecting fields .....	70
Grouping records .....	71
Sorting records .....	72

Contents

Setting record filters ..... 73

Viewing the data, running a query, and outputting the query results ..... 77

# Chapter 1: Introduction

This guide provides an overview of the reports available in Sage HRMS, Sage HRMS Payroll, Sage HRMS Train, and custom and standard reports using SAP Crystal Reports.

## Support and Resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Product Documents:** Visit the Sage HRMS [Product Documents website](#) to view the latest installation, setup, and user guides.
- **Sage City:** Visit the online community at <http://sagecity.na.sage.com/> for blogs, tips, and guidance for your Sage programs.
- **Customer Support:** For additional articles, visit the Sage Knowledgebase at <https://support.na.sage.com>. For more support resources, visit the [Sage City Customer Resources page](#), select your country, and then select your product.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Tax forms:** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at [www.SageChecks.com](http://www.SageChecks.com).

# Chapter 2: Employee reports

Sage HRMS includes many HR and employee reports that are grouped into the following categories:

- "Code table reports" (page 2)
- "Compensation reports" (page 4)
- "EEO reports (U.S.)" (page 7)
- "Employee and organization reports" (page 9)
- "Employment equity reports (Canada)" (page 10)
- "Leave reports" (page 11)
- "OHS reports (Canada)" (page 12)
- "OSHA reports (U.S.)" (page 13)
- "Pay equity reports" (page 14)
- "Personal information reports" (page 15)
- "Benefit reports" (page 16)
- "Skill and education reports" (page 18)
- "Wellness reports" (page 19)

## Code table reports

Use the following code table reports to review the codes in your code tables for employees for the enterprise or an employer. You can print the reports before making a change to the code tables, and then print them again after the change as a reference.

- Aboriginal Codes
- Attachment Codes
- **Benefit** Insurance Plans
- **Benefit** Rate Tables
- **Benefit** Savings Plans
- **Benefit** Type Codes
- Census Metro Area Codes

- Consent Types
- **Dependent** Relationship Codes
- Direct/Indirect Codes
- Disability Codes
- EE Category Codes
- EE Occupational **Group** Codes
- **EEO** Classification Codes
- **EEO** Job **Group** Codes
- **EEO-4** Job **Function** Codes
- Employee Note Author Codes
- Employee Note Type Codes
- Employee Type Codes
- Ethnic ID Codes
- Event Codes
- **FMLA** Event Reason Codes
- Industrial Sector Codes
- Job Classification Codes
- Job Codes
- Job Family Codes
- Job Status Codes
- Language Codes
- NOC Occupation **Group** Codes
- OHS Body Part Codes
- OHS Injury Codes
- OHS Injury Location Codes
- **OSHA** Body Part Codes
- **OSHA** Injury Codes
- **OSHA** Injury Location Codes
- Organization Codes
- Pay Equity Job **Group** Codes
- Rating Codes



- Reason Codes
- Salary Grades
- Shift Differential Codes
- Skill Codes
- State/Province Codes
- Step Rate Codes
- Union Codes
- **User**-Defined Codes
- Visible Minority Codes

## Compensation reports

These reports track reviews, new hires, and terminations, as well as a variety of salary analyses and job code statistics.

**Note:** Many compensation reports include the compa-ratio, which is the employee’s percent-of-midpoint within a salary range. This is the formula for calculating compa-ratio:

$$\text{Compa-ratio} = \text{Employee's salary} / \text{Midpoint for Salary Grade} * 100$$

**Compa-ratio** calculations do not print unless you enable Salary Grade Table **Validation** during employer setup.

Report name	Description
Ranked Salary List	Displays the annual salaries of all your employees in descending order. The report includes annual salaries, unit rate, employees, employee titles, and organization level. You can include all, exempt, or nonexempt employees.
Reviews Due	Displays performance and salary reviews by month. You can include performance or salary reviews—and sort by organization level or supervisor. If you select open reviews, the report includes reviews with a <b>Next Review Date</b> that is earlier than the one specified; the program considers reviews open until the <b>Next Review Date</b> is updated.
Review Forms for Reviews Due	Displays employee job and salary history. It also provides a section of requested changes for the reviewer to fill out and management to sign. The options are identical to those for the Reviews Due report. When the form is completed, it is intended for use in updating the employee information affected by the review.

Report name	Description
Salary <b>Analysis</b> by Employee Name	Displays salaries categorized by individual employees, job title, all employees, or your search criteria. The report includes pay rates, hours, annual salaries, longevity, and compa-ratio.
Salary <b>Analysis</b> by Job <b>Code</b>	Displays salaries by job code, individual employee, all employees, or your search criteria. The report includes job titles, salary grades, pay rates, annual salaries, and other data. It is sorted by exempt and nonexempt employees.
Salary <b>Analysis</b> by Job Title	Displays salaries by job title, job code, individual employee, all employees, or your search criteria. The report includes pay rates, hours, annual salaries, longevity, compa-ratio, and other data.
Salary <b>Analysis</b> by Organization	Displays employees' salaries by organization level. The report includes the employee's pay rate, hours, annual salary, years of service, rating, and compa-ratio. The report also displays the employees' average annual salary, total annual salary, and number of employees. The report includes the subtotals for each organization level; the totals for the employer appear at the end the report.
Salary <b>Analysis</b> by Salary Grade	Displays salaries by salary grade, individual employee, all employees, or your search criteria. The report includes job titles, salary grades, pay rates, annual salaries, and other data. The report averages and totals the annual salaries for each salary grade.
Salary As Of	Displays employees and their respective salaries at a given point in time. The report includes the employee name, job title, unit pay rate, and annual salary as of the selected date. The report also includes the total of the salaries displayed and a calculated salary average. You can select individual employees, all employees, or specify search criteria.
Salary Grade Range Exceptions	Displays employees whose rate of pay is different (more or less) from their assigned salary grade range. This report works only if Salary Grade <b>Validation</b> is enabled during setup of Sage HRMS. Grouped by organization levels, the report includes the employee, title, salary, normal salary grade range (minimum and maximum), and the difference in dollar amount between the salary grade range and what the employee is paid.
Salary History	Displays employee compensation history, including the employees, effective dates, reasons for change, salary rates, and annual salaries.
Salary Increase <b>Analysis</b> by Job <b>Code</b>	Displays salary increases by job code, including previous versus current salaries, effective dates, reasons for adjustments, and actual and percentage amounts of increases.

Report name	Description
Salary Increase <b>Analysis</b> by Organization	Displays employee salary increases by organization level. The report includes previous versus current salaries, effective dates, reasons for adjustments, and actual and percentage amounts of increases.
Salary Increase <b>Analysis</b> by Reason	Displays employee salary increases by reason. The report includes previous versus current salaries, effective dates, reasons for adjustments, and actual and percentage amounts of increases.
Statistics by Job <b>Code</b>	Groups statistical data into exempt and nonexempt employee categories. For each job code, the report shows titles, number of employees in each category, average unit rate, and average and total salaries.
Terminated Employee Log	Displays terminated employees for a specified date range. The report searches the <b>Employee Status</b> for all employees tagged as terminated. The report provides dates of hire and termination, name, employee number, reason for termination, title, organization levels, employee type, longevity, pay rate and frequency, and annual salary. The report sorts the employees by termination date, gives a headcount, and calculates average and total terminated salaries.
Turnover Performance vs. Longevity Matrix	Displays information about the turnover rate within your organization. The report might indicate a problem if employees with a high performance rating consistently leave your company, while poor performers have remained with the company a long time. The report lists performance ratings vs. length of time employed for terminated employees.
Turnover Statistics	Displays turnover statistics and calculates service length by <b>Adjusted Seniority Date</b> , <b>Original Hire Date</b> , or <b>Last Hire Date</b> . For each terminated employee, this report includes termination type, termination date, employee name, title, service length, salary grade, and termination reason.

## EEO reports (U.S.)

Use **EEO** reports to track the compliance of your company's hiring practices.

Report name	Description
<b>EEO Job Group Age Analysis</b>	Displays the number of employees from specific age groups falling within each <b>EEO</b> job group. In addition to assisting you with ADEA compliance, this report helps you analyze your work force and plan for groups of employees who are approaching retirement.
<b>EEO Job Group Headcount</b>	Displays the number and percentage of employees in each gender and ethnic group who fall within specific <b>EEO</b> job groups.
<b>EEO New-Hire Headcount Detail</b>	Displays new hire employees grouped by <b>EEO</b> classification.
<b>EEO New-Hire Headcount Summary</b>	Displays the <b>EEO</b> classifications with the number of new hire employees in each classification. The summary is broken down by gender and ethnic origin.
<b>EEO Termination Detail</b>	Lists terminated employees grouped by <b>EEO</b> classification.
<b>EEO Termination Summary</b>	Displays the <b>EEO</b> classifications with the number of terminated employees in each classification. The summary is broken down by gender and ethnic origin.
<b>EEO-1 Headcount Detail</b>	Displays a list of employees grouped by <b>EEO</b> classification, which enables you to reconcile the information generated in the <b>EEO</b> Headcount Summary report.
<b>EEO-1 Headcount Summary</b>	Displays a table showing <b>EEO</b> classifications and the number of employees in each classification. The table is broken down by gender and ethnic origin. Each column is totaled.
<b>EEO-4 Headcount Detail</b>	Displays employees grouped by <b>EEO</b> classification so you can reconcile the information with the <b>EEO</b> Headcount Summary. This <b>EEO-4</b> report consists of multiple pages and is not intended to be submitted to the government as the official <b>EEO-4</b> form.
<b>EEO-4 Headcount Summary</b>	Displays <b>EEO</b> classifications with the annual salaries and employee counts in each classification, including gender and ethnic origin. Each column is totaled. This report is not intended to be submitted to the government as the official <b>EEO-4</b> form.

Report name	Description
I-9 Citizenship Verification	Lists employees with their I-9 citizenship status and renew dates.
Promotions	Displays the <b>EEO</b> class codes, genders, and ethnic backgrounds of employees promoted within a specific time period.
Veterans Employment	<p>Displays <b>EEO</b> classifications (job categories) with the number of employees and new hires in each classification. The report is broken down by veteran status.</p> <div data-bbox="456 625 1435 850" style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> Sage HRMS adds the number of employees in <b>EEO Class 1.1</b> (Executive/Senior Level Officials and Managers) with the number of employees in <b>EEO Class 1.2</b> (First/Mid Level Officials and Managers). The total is displayed on the report as <b>EEO Classification Code 1</b> (Officials and Managers).</p> </div>
Vets 4212 Detail List	Displays employee names and IDs by job category for each VETS-4212 category. The report includes newly hired veterans by category and total new hires for the selected 12-month period. It displays the required report data for the <b>Information on Employees</b> section of the VETS-4212 form.
Vets 4212 Form and EFile	<p>Displays the number of employees and new hires in each <b>EEO</b> classification broken down by veteran status.</p> <div data-bbox="456 1134 1435 1358" style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> Sage HRMS adds the number of employees in <b>EEO Class 1</b> (Officials and Managers) to the number of employees in <b>EEO Class 1.1</b> (Executive/Senior Level Officials and Managers), and displays the total on the report as <b>EEO Classification Code 1.1</b> (Executive/Senior Level Officials and Managers).</p> </div>
Vets 4212 Summary List	Displays the number of employees by job category for each VETS-4212 category. The report includes newly hired veterans by category and total new hires for the selected 12-month period. The report displays a summarized list of the required report data for the <b>Information on Employees</b> section of the VETS-4212 form.

## Employee and organization reports

Employee and organization reports include lists of anniversary dates, personnel events, organizational structure, years of service, business telephone directory, recruiter activity, and union activity.

Report name	Description
Anniversary List	Lists hire dates and seniority rankings for individual employees, all employees, or specified reporting criteria during one month or all months, as of the specified effective date. You can base the anniversary date on the last hire date, original hire date, or seniority date. You can sort by anniversary date, employee name, anniversary date by organization level, or employee name by organization level.
Event Report	Lists employee events, including training, licenses, bonuses, professional memberships, company cars, or anything defined in the Events code table. The report includes the employee, title, organization level, event code, effective date, event description, next due date, and comments. You can choose a specific event or report all events, as well as specify a date range for next due (renewal) dates.
New Hire Log	Lists all employees hired during the specified date range. You can choose to include or exclude rehires. You can sort by employee name or date hired.
Organizational Report	Lists employees grouped by organizational levels and supervisors. Each group includes the employee name, ID number, title, job code, seniority date, and employee type (such as RFT or RPT). The employee count is subtotaled for each organization level; the employee total appears at the end the report.
<b>Recruiter</b> Activity	Displays recruiter activity during a specified time period. For each recruiter, the report identifies new recruits, their current jobs, organization levels, and dates of hire.
Service List	Lists employees based on years of service. The report includes their years of service, seniority dates, employee names, titles, and organization levels. The report includes the employee headcount and calculates the average length of service.
Source-of-Hire Activity	Displays the sources of new hires during the specified time period. The report pinpoints new employees referred by personnel agencies, classifieds, recruiters, and all other sources.
Step Rate Service	Displays employees with their grade, step rate, service (month), job date, and job title.

Report name	Description
Telephone Directory	<p>Provides a telephone directory of all employees and organization levels. You can also build your own reporting criteria. You can select to display the full ten-digit number, an extension number, or both numbers. You can also include employees without phone numbers.</p> <p><b>Note:</b> This report uses the <b>Nickname</b> from the <b>Demographics</b> page as the employee's first name; if the nickname is blank, the report uses the <b>First Name</b>; if the first name is blank, the report prints the <b>Last Name</b> but leaves the <b>Nickname/First Name</b> column blank on the report.</p>
Union Report	Lists employees who belong to unions sorted alphabetical by name. The report includes employee titles, longevity, and union sign-up dates. You can choose to include or omit employee salaries.

## Employment equity reports (Canada)

Use Employment Equity reports to track the compliance of a Canadian employer's hiring practices.

These reports list employees based on the last activity that took place. For example, if you enter a date range of 1/1/19 through 31/12/19 and during that time Donald Adams was hired, terminated, and then rehired, the report would show Donald Adams as an active employee because the last activity was that he was rehired.

Report name	Description
EE 1 Audit: Summary	Lists employees by designated CMA, employment status, industrial sector, and province.
EE 2 Audit: Salary Summary	Lists employees by industrial sector, province, salary, and gender.
EE 3 Audit: Occupational <b>Group</b>	Lists employees by province, CMA, salary, employee name and ID, number of active and inactive employees, and total number of employees by gender.
EE 4 Audit: Hired	Displays information for new employees hired between a selected from and to date.

Report name	Description
EE 5 Audit: Promoted	<p>Displays information for employees promoted between a selected from and to date.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> Only employees whose change reason code is <b>Promo</b> are included in the report. If you set up a code for promotions other than <b>Promo</b>, employees with that code are not included on the report.</p> </div>
EE 6 Audit: Terminated	Displays information for employees who were terminated between a selected from and to date.

## Leave reports

Sage HRMS includes reports to help you track and monitor employees' leaves of absence.

Report name	Description
Employees Currently on <b>FMLA</b>	Displays all employees currently on <b>FMLA</b> leave. It includes the <b>FMLA</b> event as well as the starting and ending dates. You can include selected employees, selected organization levels, or a particular exempt status.
Employees Currently on LOA	Displays all employees currently on leave. It includes the leave reason as well as the starting and ending dates. You can include selected employees, selected organization levels, or a particular exempt status.
<b>FMLA</b> Due to Return	Displays all employees scheduled to return from <b>FMLA</b> leave. It includes the <b>FMLA</b> event as well as the starting and ending dates. You can include selected employees, selected organization levels, or selected exempt status.
LOA History	Lists employees whose LOA start date is within a specified date range. The report is grouped and sorted by employee name. It displays status, leave reason, and the start and actual return dates.
Medical Recertification	Lists employees due for medical recertification prior to returning from <b>FMLA</b> leave. The report includes the <b>FMLA</b> event as well as the starting and recertification dates. You can include selected employees, organization levels, or a particular exempt status.



## OHS reports (Canada)

The information on Occupational Health and Safety (OHS) reports comes from the information provided on the **OHS** page.

Report name	Description
Accident <b>Analysis</b> by Injury	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by injury.
Accident <b>Analysis</b> by Location	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by location.
Accident <b>Analysis</b> by Org Level	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by organization level.
Accidents by Date	Displays the number and nature of work-related injuries, illnesses, or first aid administered by date within the specified time period. The report can include individual employees, all employees, or your reporting criteria. You can include or exclude information regarding unfiled accidents and closed accidents.
Accidents by Employee	Displays the number and the nature of work-related injuries or illnesses within the specified time period. It is sorted by employee. The report can include individual employees, for all employees, or specify search criteria.
Accidents Not Filed	Displays work-related injuries or illnesses not filed during the specified time period. You can select individual employees, all employees, or specify search criteria.
WSIB - Employers Report Form 7	Creates the form for reporting a work-related accident or illness to the Workplace Safety and Insurance Board.
Workers Comp Open Claims	Displays the number of open <b>Workers' Compensation</b> claims. The report includes the number and nature of open cases, dates claims were filed and closed, case numbers and claim IDs, and number of work days the employee lost or experienced restricted duty.

## OSHA reports (U.S.)

The information in Occupational Safety and Health Act (**OSHA**) reports comes from the information provided on the **OSHA** page.

Report name	Description
Accident <b>Analysis</b> by Injury	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by injury.
Accident <b>Analysis</b> by Location	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by location.
Accident <b>Analysis</b> by Org Level	Displays the number of work-related injuries or illnesses as well as the impact of related medical costs and lost productivity on the organization due to these incidents. Events are sorted by organization level.
Accidents Not Filed	Displays work-related injuries or illnesses not filed during the specified time period. You can select individual employees, all employees, or specify search criteria.
Accidents by Date	Displays the number and nature of work-related injuries, illnesses, or first aid administered by date within the specified time period. You can select individual employees, all employees, or specify search criteria. You can include or exclude information regarding unfiled accidents and closed accidents.
Accidents by Employee	Displays the number and the nature of work-related injuries or illnesses within the specified time period. The report is sorted by employee. You can select individual employees, all employees, or specify search criteria.
<b>OSHA</b> 101 Accident Profile	Displays detailed information about employees' work-related accidents. The report includes other information such as hospital details. <b>Note:</b> This report is included for historical purposes only; it should not be used for official reporting or filing.
<b>OSHA</b> 200 Log	Displays a log and summary of occupational injuries and illness. The report does not include a total. <b>Note:</b> This report is included for historical purposes only; it should not be used for official reporting or filing.

Report name	Description
<b>OSHA</b> 300 Incident Log	Displays a log of the number of work-related illnesses and injuries sustained by employees within a given time period.
<b>OSHA</b> 300A Incident Summary	Displays the number of work-related illnesses and injuries sustained by employees within a given time period. You can sort data according to incident type and print either summary or detail versions of the report. Summary reports contain those totals you must post by law. (Detail reports contain information to help you reconcile totals in the summary reports.)
<b>OSHA</b> 301 Incident Report	Displays work-related injuries and illnesses, including company and employee home contact information, incident information, and other details.
Workers Comp Open Claims	Displays the number of open <b>Workers' Compensation</b> claims. The report includes the number and nature of open cases, dates claims were filed and closed, case numbers and claim IDs, and number of work days the employee lost or experienced restricted duty.

## Pay equity reports

The information on these reports comes from the information provided on the **Pay Equity** page. These reports assist with the process of determining male-dominated and female-dominated jobs within an organization.

Report name	Description
Job Groups by Gender	Lists employees by gender within a job and job group. This information assists with pay equity purposes.
Jobs by Gender	Lists employees by gender within a job. This information assists with the determination of male-dominated and female-dominated jobs within an organization.

## Personal information reports

Personal information includes lists of birthdays, addresses and telephone numbers, mailing labels, headcounts, and detailed employee profiles.

Report name	Description
Age List	Lists employees sorted by age. The report includes employee birth dates, titles, divisions, and departments.
Birthday List	Lists employee birthdays. It can be sorted by date, name, by date for each division and department, or by name for each division and department. It can include any or all months. You can choose whether to include address information.
Employee Attachments	Lists the attachments for a selected group of employees. You can choose whether to show employees who are missing required attachments.  <b>Note:</b> Running this report can return an error if either the total size of the HREMPATT report file exceeds the memory handling ability of the SQL server, or an attachment in the HREMPATT database is over 14.5 megabytes in size.
Employee Count	Displays a count of all employees within an organization. You can choose to count all the employees within your company, within a division, or within a department.
Employee List	Lists employee information by last name, first name, and middle initial. It also includes employee IDs, titles, and organization levels.
Employee Notes	Displays notes for the employees you specify. You can choose to print all notes or only those of a particular type or by a particular author. You can sort by employee name, note type, author, comment date, or follow-up date.
Employee Profile	Displays the profile for an individual, all employees, or the criteria you specify. You can customize the profile information by selecting the employee pages from which the program pulls information.
Home Mailing Labels	Prepares mailing labels showing employees' names and addresses printed in three-column label format (30 labels per page). You can sort these by employee name, employee ID, or zip code and employee name.  <b>Tip:</b> If sheets of labels don't move easily through your printer, try printing the labels on regular paper, then use your copier to print them on labels.

Report name	Description
Work Phone List	Lists employees' names and work telephone numbers. The report displays the standard ten-digit phone number (including the area code), the extension number, and the organization level for each employee.

## Benefit reports

All benefits reports have a selection option for **COBRA** recipients. Most benefits reports prompt for the effective date. In this way, benefits that have expired or have yet to begin are not included.

Report name	Description
<b>Beneficiary</b> List	Lists the dependents covered under each employee's benefit plans.
<b>Benefit Coverage</b> by Employee	<p>Lists personal and salary information for each employee, including the benefits, effective and expiration dates, total monthly premium costs for the employee, employee's dependents, and the amount the employee pays for coverage. You can choose to either include or exclude waived benefit plans, as well as to include or exclude history.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> This report will only display <b>Marital Status</b> and <b>Total Dependents</b> information if the effective date used to generate the report is the current system date. If another effective date is used ( such as a past or future date), this information will not appear on the report.</p> </div>
<b>Benefit</b> Enrollment by Plan	<p>Displays the totals benefits by plan. You can choose to either include or exclude waived benefit plans, as well as to include or exclude history.</p> <ul style="list-style-type: none"> <li>• For insurance plans, the report totals employee monthly premium, dependent monthly premium, employee monthly contribution, and monthly net cost.</li> <li>• For savings plans, the report totals monthly projected employee contribution and monthly employer match.</li> </ul> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> You must enter an effective date for the report. Otherwise, if the date is left blank, the report might not include all the appropriate enrollment information.</p> </div>
<b>Benefit</b> Letter	Prepares a letter showing the benefits set up for an employee.

Report name	Description
<b>Benefit Premium</b> Totals by Plan	Displays a summary headcount of each benefit plan. The report includes the plan, number of enrollees, coverage amount, employee monthly premium, dependent monthly premium, employee monthly contribution, and monthly net cost. You can choose whether to include insurance or savings plans in the report as well as include or exclude history.
Census Report	Displays information most insurance companies require when calculating the cost of providing insurance. You can send this report directly to the insurance company. The <b>Dependents</b> column on the report indicates the number of insured as specified on the <b>Dependents and Beneficiaries</b> page. An insured spouse counts as one dependent.
<b>Certificate of Coverage</b>	Displays proof of previous health insurance coverage for the employee. <ul style="list-style-type: none"> <li>• If the <b>Date of Certificate</b> (entered on the <b>Specific Criteria</b> tab) is greater than the date the employee's coverage ended, the certificate will print the employee's name, the date the coverage began (item #10), and the date the coverage ended (item #11).</li> <li>• Otherwise, if coverage has not ended (as of the <b>Date of Certificate</b>), the report will display an <b>X</b> in item #11.</li> </ul>
<b>COBRA Billing Statement</b>	Sage HRMS can track different types of <b>COBRA</b> at different rates. Sage HRMS prompts you to select which <b>COBRA</b> codes (or all) you want to use for the report. <div data-bbox="456 1150 1435 1381" style="border: 1px solid #00aaff; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> Knowing <b>COBRA</b> law and how to administer it is your responsibility. We provide you with the tools to help manage <b>COBRA</b> but assume no liability. <b>COBRA</b> laws change and are subject to interpretation. The penalty for not following <b>COBRA</b> law is severe. If you are not well versed in <b>COBRA</b> requirements, please seek professional counsel.</p> </div>
<b>COBRA Mailing Labels</b>	Prepares mailing labels for <b>COBRA</b> recipients in three-column label format (30 labels per page). You can choose the <b>COBRA</b> codes to have labels. <div data-bbox="456 1486 1435 1591" style="border: 1px solid #00ff00; padding: 5px; margin-top: 10px;"> <p><b>Tip:</b> If sheets of labels don't move easily through your printer, try printing the labels on regular paper, then use your copier to print them on labels.</p> </div>
<b>COBRA Notification Letter</b>	Prints a standard <b>COBRA</b> notification letter. You can select employees terminated within a specific date range. You can also specify a markup factor.

Report name	Description
<b>COBRA</b> Recipient Report	Lists people receiving <b>COBRA</b> benefits and how long they have received these benefits. The report includes the recipient's name, division and department, termination reason, date of termination, number of months the individual has received <b>COBRA</b> , and the number of total dependents (including the insured).
Employee <b>Benefit</b> Changes	Displays changes in employee benefits. You can choose whether to include or exclude history.
Insurance <b>Coverage</b> Detail	Displays detailed information about each employee's insurance benefit plans. It includes the dependents covered under each plan, when their coverage was in effect, and the individual coverage and premium amounts for each dependent (when applicable). The report also contains insurance plan information that is currently not available on any other standard report. You can choose to include or exclude waived benefit plans, as well as to include or exclude history.

## Skill and education reports

These reports help you track and record the skill sets and educational background of your employees.

Report name	Description
Education Report	Lists education information for all employees in the selected employer.
License/Certificate	Lists all licensed and certified employees in the selected employer, including the effective dates and due dates.
Membership List	Lists all employee memberships, including the effective dates and due dates.
Previous Experience	Displays each employee's previous work experience, including from and to dates and previous salaries.
Skill Retrieval	Displays employees who have specific skill sets. For each skill you choose, the report includes each employee's title, organization level, and date of hire.
Skill and Education List	Displays an alphabetized list of individual employees, all employees, or the reporting criteria you specify. The report includes each employee's skills, years of experience in each skill, and a comment area that provides short details about each skill. The report also includes the schools attended, attendance duration, grade point averages, and scholastic degrees earned.
Skills Report	Lists skills for all employees in the selected employer, including specialized skills such as fluency in other languages.

## Wellness reports

The information on these reports comes from the information provided on the **Wellness** page.

Report name	Description
Blood Donor List	Lists each employee's department and division, blood type, RH factor, and last donation date. The report also provides the employee's telephone extension. You can choose to include only employees with specific blood types or all employees as of a specified date.
Drug Tests Due	Displays the employee's name, date of the most recent drug test, its result, the date of the next test, the number of years since the last test, and the employee's telephone extension.
Emergency Contacts	Lists employees and their emergency contacts.
Health Profile	Displays an overall view of the employee's health, which may include allergies, chronic conditions, wellness programs, blood type and eligibility for donation date, height, and weight.
Physical Exams Due	Displays the date of the employee's last physical exam, the result of that physical, the date of the next physical, the number of years since the last physical, and the employee's telephone extension.



# Chapter 3: Time Off reports

Sage HRMS Time Off includes many attendance reports that are grouped into the following categories:

- "Attendance reports" (page 20)
- "Time Off code table reports" (page 22)

## Attendance reports

These reports provide information about employee absences, Time Off details, and attendance-related benefits.

Report name	Description
Absence Averages	Displays statistics on the average number of absences per employee for each absence reason. You can specify a date range as well as show averages for only one or all absence reason codes. You can sort by organization level or absence reason code.
Absence Log	Displays the absence reason codes for each employee along with the date, weekday, number of hours, and comments regarding each absence. You can select one employee or a group of employees, include one or all absence reason codes, and specify a date range. You can sort by Employee Name or ID.  <b>Note:</b> The Absence Log replaces the manual attendance card.
Absence Percentages by Department	Displays the percentage of absences for each absence reason for each weekday sorted by department. The <b>% of Reason</b> column shows the percentages for each reason within a department for all weekdays. The <b>% of Company</b> column shows the percentage of absences for each reason within the employer. You can specify a date range. This report helps you analyze the reason for absences within given departments.
Absence Percentages by Reason	Displays the percentage of absences in each department for each absence reason code for every day of the week. The <b>% of Org</b> column shows the percentage of absences for each department and every day of the week. The <b>% of Company</b> column shows the percentage of absences within the employer. You can specify a date range for the report. This report helps you compare the departmental absences.

Report name	Description
Absence Points	Lists the employees who fall within a specified range of absence points from the threshold value established for each attendance plan. The <b>Over</b> column shows the number of absence points over the threshold value. You can specify selected employees or employee groups, a date range, and the number of points from the threshold value. The report helps you spot employees who exceed your employer's threshold values.
Employee Year-To-Date Attendance Detail	Displays a summary of attendance information for each plan, including carryover hours, hours accrued, hours taken, and hours available. The report also lists absences chronologically for each plan. (If an employee has zero hours available for a plan, the plan does not appear on the report.) You can select specific employees, employee groups, organization levels, a date range for the absences, and whether to include absence comments.
Employee Year-To-Date Attendance Totals	Displays a summary of hours accrued, taken and available as of the current accrual date. For each employee, the report lists the totals for every attendance plan. You can include selected employees or employee groups, organization levels, and employees of a specific exempt status.
Employees Currently on <b>FMLA</b>	Displays leave statistics for employees assigned an <b>FMLA</b> event who have not yet returned to work sorted by organization level. The report includes the leave type, the <b>FMLA</b> event, the date leave started, and the scheduled return date. You can include selected employees or employee groups, organization levels, and employees with a specific exempt status.
<b>FMLA</b> Due to Return	Lists the employees scheduled to return from <b>FMLA</b> leave. The report includes the leave type, the <b>FMLA</b> event, the date leave started, and the scheduled return date. You can include selected employees or employee groups, organization levels, and employees with a specific exempt status.
Medical Recertification	Lists the employees due for medical recertification before returning to work from an <b>FMLA</b> event sorted by organization level. The report includes the leave type, the <b>FMLA</b> event, the date leave started, and the recertification date. You can include selected employees or employee groups, organization levels, and employees with a specific exempt status.
Perfect Attendance	Lists the employees who have perfect attendance within a specified date range. You can select one or a group of employees, organization levels, employees with a particular exempt status, and absence transactions within a specified date range. Time Off calculates years of service for each employee as of the <b>Seniority Start Date</b> on the employee's <b>HR Status</b> page.

Report name	Description
Previous Year End Totals	Displays the carryover hours, hours accrued, hours taken, and hours available as of the previous plan year close date for each employee and each attendance plan. It also totals the attendance information for all plans. You can include selected employees or employee groups, organization levels, and employees with a particular exempt status.
Ranked List by Hours Absent	Displays the total number of absence hours taken for each absence reason for each employee. The report groups the information by reason code and lists the employees within each reason code. You can include selected employees or employee groups, organization levels, and employees with a particular exempt status.

## Time Off code table reports

Use the following code table reports to review the codes in your code tables for Time Off. You can print the reports before making a change to the code tables, and then print them again after the change as a reference.

- Absence Reason Codes
- **FMLA** Event Reason Codes

# Chapter 4: Payroll Reports

Sage HRMS includes many payroll reports that are grouped into the following categories:

- "Bank reports" (page 23)
- "Employee Payroll reports" (page 25)
- "General Ledger reports" (page 26)
- "Government reports" (page 27)
- "Periodic processing reports" (page 29)
- "Setup Payroll reports" (page 30)
- "Transaction reports" (page 31)

## Bank reports

These reports provide information to assist you in managing your company's bank accounts, setup options, and transactions, as well as in reconciling bank accounts.

Of the transaction reports, most use landscape orientation (for both previewing and printing)—only the Reconciliation Status and Reconciliation Posting Journal reports use portrait orientation.

Report name	Description
Bank Entries Posting Journal	(Transaction report) Lists bank entries that were posted together. The report provides an audit trail of transactions posted using bank services by posting sequence.
Bank Reconciliation	(Transaction report) Displays the result of the last posted bank reconciliation for each bank included in the report. The report shows the difference between the bank statement and your company records.
Banks	(Setup report) Lists the banks set up for your company, including the G/L account and other information about each bank. Generate the report after you add, change, or delete banks.
Check Payment Register	(Transaction report) Lists all payments made from a particular bank account for a specified period of time.
Deposit Register	(Transaction report) Lists all deposits to a particular bank account or a range of banks over a specified period of time.

Report name	Description
Deposits Status	(Transaction report) Lists all deposits (including transfers) that are currently in transit for the bank account being reconciled.
Distribution Codes	(Setup report) Lists the account distribution codes specified for bank transactions. Generate the report after you add, change, or delete distribution codes.
G/L Integration	(Setup report) Lists the options you selected on the <b>Bank G/L Integration</b> page, including when to create G/L batches (such as during posting), how to create G/L transactions (such as by creating a new batch), and whether to consolidate G/L batches.
G/L Transactions	(Transaction report) Lists the general ledger transactions created from all posted transactions. The report provides an audit trail for generated general ledger transactions.
Options	(Setup report) Lists the options you selected on the <b>Bank Options</b> page, including the transfer adjustment account number, the next posting sequence number, and the next transfer number. Generate the report after bank setup and when you change bank options.
Reconciliation Posting Journal	(Transaction report) Provides an audit trail of all transactions posted during bank reconciliation. The report includes checks and deposits that cleared the bank, as well as entries that Sage HRMS Payroll created to account for clearing differences and bank errors.
Reconciliation Status	(Transaction report) Lists the status and amounts of all transactions for a bank account.
Transaction Listing	(Transaction report) Lists all transactions recorded for one bank or a range of banks.
Transfer Posting Journal	(Transaction report) Provides an audit trail of all transactions posted during bank transfers. The report includes payments and deposits transferred between banks, transfer charges, and transfer charge adjustments, as well as tax information (optional).
Withdrawals Status	(Transaction report) Lists all outstanding checks and transfers from a bank or a range of banks.

## Employee Payroll reports

These reports include information to assist you in managing payroll for your employees.

Report name	Description
Assign Employee Earn/Ded Audit	Lists the information entered in the <b>Assign Employee Earnings/Deductions</b> window.
Assign Employee Tax Audit	(U.S. employers) Lists the Employee ID, items, and values updated through the <b>Assign Taxes to Employees</b> window, including the tax name, withholding method, amount/percent, and distribution code.
Employee Information	Lists the information entered for the selected employees in the <b>Employees</b> window.
Employee Selection	Lists the information entered in the <b>Employee Selection</b> page for the specified selection list codes. The report includes the employee number, employee name, pay frequency, and status.
Employee Supplemental Info	(U.S. employers) Lists the information you entered on the Employee Supplemental Information window.
Transaction History	Lists all transactions (in detail or summary form) for employees during the selected period.
Transaction History Audit	Lists the transaction history information entered for employees in Transaction History. For each transaction, the report includes the employee name and number associated with the transaction, date and time the transaction was last edited, transaction date, description of the transaction, and amount.
Update Employee Earn/Ded Audit	Lists the information that entered in the <b>Update Earnings/Deductions</b> window.
Update TD1 Claim Audit	(Canadian employers) Lists old TD1 claim amounts and the new TD1 claim amounts for all employees, sorted by employee number.
Update Employee Taxes Audit	(U.S. employers) Generate this report after you use the Update Tax for All Employees function to save a record.

## General Ledger reports

These reports provide you with transaction listings and status information (such as batch listings, posting journals, source journals, and the chart of accounts).

Report name	Description
Account Structures	Lists the account structure codes in the selected range, description for each code, and the segments included in each account structure, in the order they display.
Chart of Accounts	Lists all or a range of General Ledger accounts according to the selection criteria and the sort and format criteria you specify.
Account Groups	Lists account group codes, sort codes, and descriptions.
Optional Fields	Lists all the optional fields set up for your General Ledger, with a separate section for the optional fields set up for accounts and the optional fields set up for transaction details. For each optional field, the report shows the description, default value, whether the optional field is required, and whether the optional field is set for automatic insertion in new accounts.
Options	Lists the options selected and information entered on the G/L Options window, including the account-number segments defined for your ledger and the descriptions associated with those segments, and posting preferences.
Segment Codes	Lists all or a range of codes defined for each G/L segment. The report includes the code descriptions as well as the numbers and descriptions of the retained earnings accounts to which the segment codes are closed.
Source Codes	Lists a range of source codes, along with the description entered in the <b>Source Codes</b> window for each code.  <div style="border: 1px solid green; padding: 5px;"> <p><b>Tip:</b> Source codes add flexibility to your General Ledger, because you define them. You can select and print lists of posted transaction details by source codes, using the Source Journal report from the G/L Reports folder.</p> </div>
Source Journals	Lists the details of posted transactions for the source codes that included in the source-journal definition. You can specify the sort order.

## Government reports

These reports include information required to report payroll details to the government.

Sage Payroll Tax Forms and eFiling by Aatrix services are included with Sage HRMS Payroll for many of the government reports. Sage Payroll Tax Forms and eFiling by Aatrix enables you to file tax forms electronically from a Sage client workstation.

### U.S. government reports

Report name	Description
Federal Tax Filing	When you select this report, a window opens so you can select the federal form (such as form 940, 941, 943, 944, 945, 1095, 1-9, and W-4.
State Tax Filing	When you select this report, a window opens so you can select a tax form specific to your state. The tax forms are kept up to date by the Sage Payroll Tax Forms and eFiling by Aatrix service. If you are prompted to update tax forms after clicking the <b>Display</b> button, follow the prompts to update; otherwise the tax forms may not include the latest state requirements.
W-2 Forms	Use to save or print employee W-2 data to a paper report or e-file the W-2 forms using the Sage Payroll Tax Forms and eFiling by Aatrix service.

### Canadian government reports

Report name	Description
CRA Remittance Info	<p>Displays the remittance information required by Canada Revenue Agency (CRA) for the selected check date range, and for employees selected by employee range and/or selection list. The report shows earnings subject to tax, employee withholding and employer contributions for EI and CPP, and employee withholding for income tax, sorted by the account number (tax reporting ID) of the employment insurance rate assigned to each employee.</p> <p>You select one of the following for <b>Report Type</b>:</p> <ul style="list-style-type: none"><li>• <b>Summary</b>: prints only the totals for each EI tax reporting ID and report totals, for the selected employees.</li><li>• <b>Detail</b>: provides the information in the date range for each employee, totals for each EI tax reporting ID, and report totals.</li></ul>



Report name	Description
Ministère du Revenu Info	<p>Displays the remittance information required by Revenu Québec for the selected check date range, and for employees selected by employee range and/or selection list. The report shows earnings subject to tax, employee withholding and employer contributions for EI and QPP, employer contributions for QHSF, and employee withholding for federal and provincial income taxes, sorted by the account number (tax reporting ID) of the employment insurance rate assigned to each employee.</p> <p>You select one of the following for <b>Report Type</b>:</p> <ul style="list-style-type: none"> <li>• <b>Summary</b>: prints only the totals for each EI tax reporting ID and report totals, for the selected employees.</li> <li>• <b>Detail</b>: provides the information in the date range for each employee, totals for each EI tax reporting ID, and report totals.</li> </ul>
R1s Electronic Filing	<p>Generates a file with Relevé 1 information for the specified year that you can submit to Revenu Québec.</p>
<b>Record</b> of Employment	<p>Displays the information for an employee who stops working in insurable employment. This <b>Record</b> of Employment (ROE) report is used by Service Canada to determine whether the person is eligible to receive EI benefits, what the benefit amount will be, and for how long the benefits will be paid.</p> <p>This report includes information from Payroll's online <b>Record Of Employment</b> window, and the EI information maintained by Payroll. On the <b>Record Of Employment</b> window, enter the ROE information for the 53-week reporting format if you plan to use the ROE Web function; you can then generate an ROE file to submit electronically (by Internet) to Service Canada's ROE Web application.</p>
Relevé 1s	<p>Displays the Relevé 1s by year, formatted as required by Revenu Québec. To review employees that may be out of balance based on expected CPP/QPP and EI contributions, open the T4s selection from Government Reports and select the Print CPP/QPP and EI Balancing Report option.</p>
T4s	<p>When you select this report, you can select either:</p> <ul style="list-style-type: none"> <li>• T4s, which you can print or save by year, formatted as required by the Canada Revenue Agency (CRA).</li> <li>• CPP/QPP and EI Balancing report, which is for your review; it lists employees that may be out of balance based on expected CPP/QPP and EI contributions.</li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> The payroll program supports many but not all "Other Information" boxes on the T4 and T4A.</p> </div>

Report name	Description
T4s Electronic Filing	Generates a file with T4 information (including the T4 Summary) for the specified year that you can submit to the Canada Revenue Agency (CRA).
T4As	<p>Sage HRMS Payroll prints the information on the T4A for the selected year required by Canada Revenue Agency (CRA). Follow the instructions in your tax update package to install the tax update and print T4As.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> The payroll program supports printing "Other Information" on the T4A, but only in a single box containing the total of all "Other Information" earnings for an employee. To enter multiple "Other Information" earnings, clear the <b>Print Total Amount</b> option on the T4As page before printing, and manually enter the amounts on the T4A.</p> </div>
T4As Electronic Filing	Generates a file with T4A information (including the T4A Summary) for the specified year that you can submit to the Canada Revenue Agency (CRA).

## Sage Payroll Tax Forms and eFiling by Aatrix

The Sage Payroll Tax Forms and eFiling by Aatrix feature is included with Sage HRMS Payroll.

Sage Payroll Tax Forms and eFiling by Aatrix enables you to file more than 250 state, provincial, and federal withholding, unemployment, and new hire reports from the data produced by Sage HRMS Payroll. You can print and mail the tax forms or eFile them. You can also email the forms to your employees using the Sage Payroll Tax Forms and eFiling by Aatrix interface. To ensure legislative compliance, you are prompted every quarter to download and install updated forms.

For a detailed overview, FAQs, and price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit: <http://partner.aatrix.com/sagehrms>

## Periodic processing reports

These reports provide transaction listings and status information for specific tasks in Sage HRMS (such as batch listings, posting journals, source journals, and the chart of accounts).

Report name	Description
Delete Inactive Records Audit	Displays the information deleted using the Delete Inactive Records payroll task.
Duplicate SSN/SIN	Lists social security numbers (SSNs) or social insurance numbers (SINs) that are assigned to more than one employee, if applicable.

## Setup Payroll reports

These reports enable you to review the information you entered when setting up payroll features in Sage HRMS Payroll.

Report name	Description
<b>Class</b> Codes	Lists the information entered for <b>Class 1</b> , <b>Class 2</b> , <b>Class 3</b> , and <b>Class 4</b> on the <b>Class Codes</b> page including the class codes and descriptions assigned to each class.
Common Deduction Limits	Lists details entered in the <b>Common Deduction Limits</b> window, such as the deduction, description, employee annual maximum, and employer annual maximum.
Earnings and Deductions	Lists the information set up for accruals, advances, benefits, deductions, earnings, or expense reimbursements. The report must be generated for one earning/deduction category at a time.
EFT Combine	Lists the companies entered on the <b>EFT Combine</b> page.
EFT Options	Generate this report after setting up your EFT (direct deposit) options or whenever you want to verify the setup of the banks you use for direct deposit. This report lists the information entered on the <b>EFT Options</b> page.
G/L Integration	Generate this report to verify the information entered on the <b>G/L Integration</b> page.
Optional Fields	Generate this report after setting up optional fields or whenever you want to verify the optional fields that were set up.
Options	Lists the information entered on the <b>Payroll Setup Options</b> window, including the years of history to keep, pay periods per year, hours per pay frequencies for each pay frequency, and integration options.
Overtime Schedules	Lists the information entered for the selected overtime schedules on the <b>Overtime Schedules</b> page.
Shift Differential Schedules	Lists the information entered for the selected shift differential schedules on the <b>Shift Differential Schedules</b> page, including shift differential rates for Shift 1, Shift 2, Shift 3, and Shift 4.

Report name	Description
Update Local Taxes Audit	(U.S. employers) Logs all changes made to the <b>Local/Other Tax Codes</b> window. The report includes the date and type of each change, if the tax setup is new or was modified, and the new value of each change if applicable). After it is printed, the audit report clears.
Work Classification Codes	Generate this report after setting up or modifying work classification codes.
<b>Workers' Compensation</b> Codes	Lists the information entered for the workers' compensation groups and codes on the <b>Workers' Compensation Codes</b> page, including the workers' compensation group, codes, descriptions, and rates (current and previous).

## Transaction reports

These reports enable you to review a variety of payroll information such as employee earnings and hours and electronic funds transfer (EFT or direct deposit) transactions.

Report name	Description
Accruals	Displays posted paychecks and entries made in transaction history. You can choose to display the hours and amounts that have been accrued and paid—or as an accrual carry-over log that displays the accrual amounts or hours that were carried over to the start of a new accrual period.
Earnings and Hours	Displays employee hours and totals as well as other information based on the report options you select.
Earnings/Deductions Summary	Displays earning/deduction codes and their descriptions, as well as other information based on the report options you select.
Earns/Deds Summary for T4A/R2	(Canadian employers) Lists employees who are assigned earnings and deductions with T4A and/or R2 (Releve 2) Reporting settings. The report summarizes amounts for each earning and deduction.
EFT Combine History	Lists the EFT combine files created after using the Combine EFT File process.
EFT Direct Deposit	Lists the details of the most recently generated EFT file. Generate this report before you submit the file to your bank.

Report name	Description
EFT Transactions	Displays the details of paychecks that were directly deposited. This report includes information about each direct deposit transaction, such as the employee's number and name, bank account information, paycheck number, and amount deposited.
Employee Timecards	Lists employee timecards. Use this report to ensure the timecards are complete and accurate before you calculate payroll.
Hours <b>Analysis</b>	Displays the hours (regular, overtime, shift) that were paid for each earning on an employee's paycheck as well as the hours that were paid and accrued for each accrual on the paycheck.
Payroll G/L Transactions	Generate this report before using Create G/L Batch. This report includes only G/L transactions created on request using Create G/L Batch; it does not include G/L transactions created during payroll posting.
Payroll Processing Exceptions	Lists error conditions that Sage HRMS Payroll encounters during processing.
Payroll Register	Lists payroll information for calculated payroll, including the check date, amounts of the checks, calculation sequence, posting sequence, employee numbers, names, social security numbers/social insurance numbers, times late, employee earnings/deductions and tax lists.
Pre-Check Payroll Register	Generate this report to review the payroll register before generating checks.
Tax Calculation <b>Analysis</b>	Generate this report to review tax information and totals by employee. The information displayed depends on the report style you choose.
Timecards	Generate this report to review employee timecard information. This report includes employee numbers, names, timecard numbers, descriptions, statuses, earning/deduction information entered for the pay period, tax overrides for the pay period, total hours for regular and shift earnings, total amounts for vacation, sick, and compensatory or banked time paid.
<b>Workers' Compensation</b>	Generate this report to review workers' compensation information. The report includes worker's compensation group, code, description, rate, employee total pay, excess earnings, assessable earnings, worker's compensation code totals, and company totals. The format depends on the report style you choose.

# Chapter 5: Training reports

Sage HRMS Train includes many training reports that are grouped into the following categories:

- "Catalogs and code table reports" (page 33)
- "Class administration reports" (page 34)
- "Employee training reports" (page 35)
- "Training analysis reports" (page 36)

## Catalogs and code table reports

Use the following code table reports to review the codes in your code tables for Sage HRMS Train. You can print the reports before making a change to the code tables, and then print them again after the change as a reference.

- **Certification** Codes
- **Class** Ratings
- **Course** Catalog
- **Course** Types
- Enrollment Status Codes
- Instructor Catalog
- Instructor Ratings
- Job Codes
- Job Requirements
- Organization Codes
- Priority Codes
- State / Province Codes
- Training Locations
- Training Programs
- **User**-Defined Codes

## Class administration reports

These reports provide information so you can track classes and participants as well as generate class enrollment and completion letters.

Report name	Description
<b>Class Completion Letters</b>	<p>Prints <b>Class</b> Completion Letters for all employees who completed the selected class or group of classes.</p> <p>Each letter prints on a separate page and can include the following letter sections:</p> <p>Enterprise Logo, Enterprise Name, Current Date, Employee Information, Greeting, Introduction, <b>Class</b> Information, and Closing.</p> <p>You can include or exclude any of these sections or change their content by using the Edit <b>Class</b> Correspondence task. You can choose to only include employees with a particular enrollment status.</p>
<b>Class Enrollment Letters</b>	<p>Prints <b>Class</b> Enrollment Letters for all employees who enrolled in the selected class or group of classes.</p> <p>Each letter prints on a separate page and can include the following letter sections:</p> <p>Enterprise Logo, Enterprise Name, Current Date, Employee Information, Greeting, Introduction, <b>Class</b> Information, and Closing.</p> <p>You can include or exclude any of these sections or change their content by using the Edit <b>Class</b> Correspondence task. You can choose to only include employees with a particular enrollment status.</p>
<b>Class Rosters</b>	<p>Lists the employees on the class rosters of selected classes. The report is sorted by class start date and class ID number. Within each class, the employees are sorted by enrollment status and last name. You can choose to only include employees with a specific enrollment status.</p>
<b>Class Schedules</b>	<p>Lists the classes that are in progress or scheduled to begin during a specified time period. You can also include classes that were completed or were canceled. The report is sorted by class start date.</p>
<b>Mailing Labels</b>	<p>Prints mailing labels for employees who enrolled in a selected class or group of classes. You can choose to only include employees with a particular enrollment status. The report is formatted for label sheets with 30 labels per page (three columns of 10 labels each). If you print labels for more than one class, the labels for each class begin on a new sheet.</p>

Report name	Description
Overbooked Classes	Lists the classes that have more employees enrolled than the class's maximum capacity. The report is sorted by class start date.
Participants Training History	Summarizes the courses already taken and courses scheduled for each employee enrolled in a specific class. If you select more than one class, a separate report is printed for each class. You can choose to only include employees with a particular enrollment status. If an employee's status in a class is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays.

## Employee training reports

These reports provide information so you can track completed and required courses, training programs, and certifications for all employees as well as training expenses and tuition reimbursements.

Report name	Description
Employee Certifications	Lists the certifications received or required for a selected group of employees. The report is sorted by employee last name. Within each employee group, the certifications are sorted by date required, with the earliest certifications listed first.
Employee List	Lists the employees by last name. You can also choose to include non-employees. The report includes their titles and organization levels, if applicable.
Employee Required Courses	Lists the courses that employees must complete over a specified time period. For each employee, the classes are sorted by priority, with courses that are most important and that must be completed soonest listed first. The report also displays the date by which they must be completed.
Employee Training Profile	Lists the courses an employee completed as well as courses that still need to be taken. It is a combination of the Training History by Employee and Employee Required Courses reports. If an employee's status in a course is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays.
Employee Training Programs	Lists the training programs that employees completed over a specified period. You can also include programs that are in progress—the report then shows courses completed and courses still remaining within each program.



Report name	Description
Employees with a <b>Certification</b>	Lists the employees who received or require a certification. The report is sorted by certification group. Within each certification group, you can choose to sort by employee name or by expiration date. You can include all certifications or only a specific certification.
Training Expenses by Employee	Lists the expenses associated with courses completed by an employee during a specified period of time. You can also include courses that are scheduled but not yet completed. If an employee's status in a course is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays.
Training History by Employee	Lists the courses completed by an employee over a specified period of time. You can also include courses that are scheduled but not yet completed. If an employee's status in a course is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays.
Training Schedules by Employee	Lists the courses that are in progress or scheduled to begin over a specified period of time. You can also include courses that are already completed.
Tuition Reimbursements	Lists the tuition reimbursements an employee received or requested over a specified period of time. The report is sorted by employee last name. Within each employee listing, courses completed most recently are listed first. You can select to include all courses, only those of a particular type, or only those with a particular status. If an employee's status in a course is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays.

## Training analysis reports

These reports provide information so you can track course fees and expenses, class attendance, class utilization, and class ratings.

Report name	Description
<b>Class</b> Attendance Summary	Summarizes attendance totals for all classes offered over a period of time, grouped by course code. The report also includes the percentage of people that did not show up for class, the percentage that canceled, and the percentage of available class space that was used.

Report name	Description
<b>Class</b> Financial Summary	Summarizes financial information for all classes offered over a period of time. Only classes with a status of <b>Completed</b> are included in the report. The report compares budgeted costs with actual costs—and total fees with actual costs. The Cost Per Student represents the additional cost per student (beyond fixed costs) and is calculated by subtracting the Average Fixed Costs from the Average Actual Costs and then dividing by the Average Attendance. The Breakeven Fee is an estimate of the fee that should be charged to recover the total class costs and is calculated by dividing the Average Fixed Costs by the Average Attendance and then adding the Cost Per Student.
Expenses by <b>Course</b>	Displays the expenses for all courses taken over a period of time, grouped by course code. You can choose to display just the total expenses for each course code or to display the records for each course taken during the specified period. You can select to include employees with a particular enrollment status.
Expenses by Job Title	Displays the expenses for all courses taken over a period of time, grouped by job title. You can choose to display just the total expenses for each job title or to display the records for each course taken during the specified period. You can select to include employees with a particular enrollment status.
Expenses by Org Level	Displays the expenses for all courses taken over a period of time, grouped by organization level. You can choose to display just the total expenses for each organization level or to display the records for each course taken during the specified period. You can select to include employees with a particular enrollment status.
Training Exception	Lists employees that need to take a specific course or specific courses. The report is sorted by course code. Within each course code, you can select to sort employees by name or by priority, in which case employees to whom the course is most important and who need to complete it the soonest are listed first. You can also select to include employees who are already scheduled to take the course. Use this report to determine which employees need training.
Training History by <b>Course</b>	Lists employees that completed a specific course or are scheduled to complete a course. You can also select to include a number of courses, in which case the report is sorted by course code and all employees that have completed the course are grouped together. You can select to include employees with a particular enrollment status. If an employee's status in a course is <b>Completed</b> , their grade (if any) displays in the <b>Grade</b> column; otherwise, their enrollment status displays. You can also select a specific date range.

# Chapter 6: System reports

System reports are provided to help you manage your Sage HRMS database, security, reporting, and the entire system.

## Audit trail reports

Sage HRMS provides an audit trail so you can track the changes data entry personnel made to the system databases. For each user who makes changes to Sage HRMS data, the audit trail records the employee number, the date and time, the type of change, and the new and old values of the affected data.

**Note:** The audit trail only tracks changes made to employees. It does not track changes to rules or setup activities.

To access audit trail reports:

1. Select **Reports > System > Audit Trail Reports**.
2. In the report options window, you can select to include specific files, fields, users, or employees as well as to specify a date range. You can also specify your own criteria to determine the content of the report.

There are three audit trail reports.

Report name	Description
<b>Audit Trail</b> by Date	Lists audit trail records sorted by the date the changes were made.
<b>Audit Trail</b> by File/Field	Lists audit trail records sorted by the files and fields that changed.
<b>Audit Trail</b> by User	Lists audit trail records sorted by the users who made the changes.

## Data Dictionary reports

The **Data Dictionary** is a collection of names and descriptions for the Sage HRMS system database tables, where all of your company and employee information is stored. Use the **Data Dictionary** reports to obtain the most recent version of the database structure in the software. After you have the database tables and structure identified, you can use this information to build custom reports.

To run **Data Dictionary** reports:

1. Select **Reports > System > Data Dictionary Reports**.
2. In the **Data Dictionary Reports** window, select one of the following options:
  - **Files List** to print a list of database files.
  - **Fields List** to print a list of all the fields within each database file.
  - **Index Keys** to print a list of the index keys.
3. Select the products you want to appear on the report by selecting the appropriate check boxes.
4. Click **Preview** to preview the report. Then, click the **Close** button to close the preview window.
5. Click **Print** to print the report.
6. Click the **Close** button to close the **Data Dictionary Reports** window.

## Using functions in reports

Functions can be used to manipulate data in Sage HRMS reports. All field names beginning with an underscore are functions. You can use them rather than the standard field names when creating custom reports by simply selecting a field name beginning with an underscore.

For example, if you insert the field name **\_SEX**, your report will display the field description of **Male**, **Female**, or **Unknown** for an employee's gender. If you insert the field name **P\_SEX**, your report will display the code **M**, **F**, or **U** instead. Some of the functions (field names beginning with an underscore) do more than display a description rather than its code. The function **\_NAME1** displays the employee's name as: **Last, First Middle**.

**Note:** When you set up your organization levels, you provide a title for each level (such as Level1 = Division) and then define the Organization **Code** tables (codes and descriptions) for each level. If you want the description for an organization in a level (**Accounting**) to appear on your report rather than the code (**ACCTG**), select the related field name that begins with an underscore (**\_LEVEL1**).

# Chapter 7: Using the standard reports

Sage HRMS provides dozens of preformatted reports designed to meet virtually any reporting need. With the standard reports, you can:

- Preview reports on your monitor.
- Print reports to your printer.
- Export reports to a file for use by other software applications.

**Note:** You can also create your own original reports using SAP Crystal Reports. Refer to the Crystal Reports online Help for detailed instructions.

## Generating reports

To generate a report:

1. Select **Reports**, then in the **Employees, Time Off, Payroll, Canadian Payroll, Training, or System** section, select the report category.
2. The **Report List** tab of the **Reports** page lists the reports in the selected category. Highlight the report you want to generate.

Sage HRMS displays the name of the report selected below the tab.

3. On the **Standard Criteria** and **Specific Criteria** tabs, [define the criteria](#) for the report.

For example, to sort the Employee Profile report by employee number rather than employee name, you can choose **Employee Number** for **Sort by** on the **Specific Criteria** tab.

You can also use criteria to limit the data appearing on a report. If you do not limit the data, the report includes all the data.

4. Click **Print**, **Preview**, or **Export** to [print, preview, or export](#) the report.

## Defining report criteria

When you select a report, Sage HRMS provides various criteria you can use to generate the report. The information on the tabs of the **Reports** window enable you to tailor the output of your report. Using sorting options and selection criteria, you can produce a variety of different reports to meet your specific needs. You can:

- Use standard selection criteria, such as employer, organization levels, and exempt status.
- Enter your own criteria to select information to include in the report.
- Select specific employees to include in the report.
- Select report-specific options including the effective date or date range, a grouping by organization level, a sort order by employee name or ID, or form alignment options.
- Save default report options for the next time you use the same report.

**Note:** After you generate a report by printing, previewing, or exporting it, Sage HRMS saves your selection criteria. The next time you select that report, the saved selection criteria displays, but you can always change it as needed for your new report.







## Report List tab

Item	Description
<report list>	Highlight the name of the report that you want to generate.
Print Range	Select either: <ul style="list-style-type: none"><li>• <b>All</b> to print all pages of the report.</li><li>• <b>Page</b> and then enter the first and last page numbers of the range of pages to print.</li></ul>
Restore Defaults	Click to return to the last settings you saved.
Save Defaults	Click to save the current report options for future use. The next time you choose this report, these settings are already selected for you. This feature comes in handy when you frequently generate a particular report.

## Standard Criteria tab

This tab lists general selection criteria that apply to all reports in a report group. Use the selection criteria to determine which employees to include in the report. Not all of the following items are available for all reports.

Item	Description
Employer	<p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Enterprise</b> to include all employees in all the employers you have set up in Sage HRMS.</li> <li>• An individual employer to include only the employees with that employer.</li> <li>• <b>Multiple</b> to include the employees in more than one employer. Another window opens so you can highlight each employer that you want to include in the <b>Available</b> list, click <b>Select &gt;</b> to move that employer to the <b>Selected</b> list, and then click <b>OK</b>.</li> </ul>
<organization levels>	<p>You can limit the report to employees who only belong to one group at a particular organization.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> The number of organization levels (1-5) and names of the levels were defined when the Enterprise was set up. The organization descriptions included in the list for each level depend on two factors: the <b>Employer</b> selection and how the organizations were set up. If you see duplicate entries in the list, this means you set up different organization codes at the employer level, but the descriptions you set up for the codes are the same. If you change your employer selection, Sage HRMS clears all organization levels. You can then reselect your organization levels</p> </div>
Changed Since	(Certain reports) You can limit the report to include only employees whose information changed since a specific date.
<course options>	(Certain Training reports) Select from options such as the course type, class description, certification, instructor, location, and date range.

Item	Description
Employee	<p>Select the <b>Active</b>, <b>LOA</b> (leave of absense), and/or <b>Terminated</b> check boxes to include employees with those statuses in the report.</p> <p>You can also click one of the following buttons to limit the employees included in the report:</p> <p> (the Employee Find button) to find a particular employee.</p> <p> (the Multiple button) to select multiple employees.</p> <p> (the Undo button) to remove the employee selections.</p> <p>For more information, see "Selecting specific employees for a report" (page 44).</p>
Individual Classes	<p>(Certain Training reports) Select the <b>Open</b>, <b>In Progress</b>, <b>Completed</b>, and/or <b>Canceled</b> check boxes to include classes with those statuses in the report.</p> <p>You can also click one of the following buttons to limit the classes included in the report:</p> <p> (the <b>Class</b> Find button) to find a particular class.</p> <p> (the Multiple button) to select multiple classes.</p> <p> (the Undo button) to remove the class selections.</p>
Custom Criteria	<p>To generate reports using criteria other than what is already provided in Sage HRMS's standard selection criteria, use the Custom Criteria function. Select one of the following methods to use:</p> <ul style="list-style-type: none"> <li>• Custom Criteria Table</li> <li>• Custom <b>Criteria Builder</b></li> <li>• Visual FoxPro <b>Expression</b> Builder</li> </ul> <p>For more information, see "Defining custom criteria" (page 45).</p>
<b>Exempt</b>	<p>You can limit the report to include only employees with the <b>Exempt</b> or <b>Nonexempt</b> overtime exempt status. If you leave this item blank, the report includes both exempt and nonexempt employees.</p>
<b>Class</b> Status	<p>(Certain Training reports) You can limit the report to classes with a status of <b>Open</b>, <b>In Progress</b>, <b>Completed</b>, or <b>Canceled</b>.</p>



## Specific Criteria tab


This tab lists options for the specific report you selected. The options on this tab vary from report to report within the report category you selected. Some examples of options are a date range, sort order, and effective date.

## Selecting specific employees for a report


To further limit your report results, you can select specific employees within the employers you selected. Using the buttons adjacent to **Employee**, specify which employees you want to select.

If you use Sage HRMS Train, you can also use the buttons to specify which courses or classes you want to include, depending on the type of training report you are running. For example, you can select classes for **Class** Administration reports and courses for most Training **Analysis** reports.


### Selecting one employee


1. Click  (the Employee Find button).
2. In the **Employee Find** window, find and select the employee you want to include.
3. Click **OK**.

After you find the employee, Sage HRMS displays the selected employee's name, employee number, and employer ID below **Employee** on the **Standard Criteria** tab.

**Note:** When you select one employee, Sage HRMS disables all other selection criteria. If you want to cancel your employee selection, click  (the Undo button) to re-enable all selection criteria.

### Selecting multiple employees

1. Click  (the Multiple button).
2. On the **Select Employees** page, the **Available** list includes all employees in the employers selected—and displays each employee's name, number, and employer ID. If you already selected a single employee, he/she automatically appears in the list of selected employees. Double-click to select an employee name and move it to the **Selected** list. (Similarly, double-click an employee name in the **Selected** list to move him/her back to the **Available** list.)
3. After selecting all employees to include in the report, click **OK**.

**Note:** When you select multiple employees, Sage HRMS disables all other selection criteria. To cancel your multiple employee selection, click  (the Undo button) to re-enable all selection criteria.

### Points to consider when selecting specific employees

When you are defining your report selection criteria by selecting employers, organization codes, and specific employees, note that if you already selected the employer or organization codes and then attempt to select a specific employee, you might receive a message that there are no employees matching your selection. This is because the employee you tried to select does not belong to the employer or the selected organization codes.

If you want to run the report for a specific employee, select blank for all your organization codes and then select the employee.

### Selecting employees by employee status

Each employee you enter in Sage HRMS has an employee status.

When you generate a report, you can include employees who have an employee status of **Active**, **LOA** (leave of absence), or **Terminated** by selecting the appropriate check boxes on the **Standard Criteria** tab.

When you run reports in Sage HRMS Train, you can select employees who are **Active**, **Terminated**, on **LOA** (leave of absence), and **Non-Employees**.

## Defining custom criteria

Use the Custom Criteria function to generate reports using criteria other than what is already provided in the Sage HRMS standard selection criteria.

**Note:** When you use any custom criteria, Sage HRMS disables all other selection criteria. To clear your custom criteria selection, select the blank option from the **Custom Criteria** list on the **Standard Criteria** tab.

## About the Custom Criteria Table

When you create expressions that define specific criteria for selecting employees, you can have Sage HRMS store these expressions in the Criteria **Code table**. When you set up options for your reports, you can choose a criteria code from (or add a new one to) the Criteria **Code table**. Sage HRMS then generates the report according to the expression set up for the criteria code you selected.

**Tip:** If the expression you want to create is one you will be using more than once, add it to your Criteria **Code** tables so it will be available for you to select any time you need it.

### To select an existing criteria code

1. On the **Standard Criteria** tab, select **Custom Criteria Table** in the **Custom Criteria** list.
2. The **Custom Criteria Table** page opens and lists the criteria codes from your Criteria **Code** Table. Highlight the code you want to use.

**Note:** If you did not define any criteria codes, only the **Add New Code** selection appears in the **Criteria Table** window.

3. Click **OK**.

The expression appears for **Custom Criteria** on the **Standard Criteria** tab.

### To add a new criteria code

1. On the **Standard Criteria** tab, select **Custom Criteria Table** in the **Custom Criteria** list.
2. On the **Custom Criteria Table** page, click **Add New Code** and then click **OK**.
3. On the **(New) Criteria Table** page, enter a description for your criteria, and then click **OK**.
4. In the **Expression Builder** window, create the expression.

For example, to generate a report for only seasonal workers, select the **P\_SEASONAL** field from the **Pe** (Employee Personnel) database table and set it equal to **(Y)es**.

5. When you complete the expression, click **OK**.

The expression displays for **Custom Criteria** on the **Standard Criteria** tab.

In the example, Sage HRMS uses the expression to generate a report that only includes seasonal employees.

## Using the Custom Criteria Builder

You can use the Sage HRMS **Criteria Builder** to build expressions for your selection criteria and save them to your Criteria **Code table**.

**Note:** With the **Criteria Builder**, you can only create an expression with fields from the Employee Personnel (HRPERSNL) database. If you need to build an expression with fields from a database other than HRPERSNL, you must use the Visual FoxPro **Expression Builder**.

### To create an expression with the Criteria Builder

1. On the **Standard Criteria** tab, select **Custom Criteria Builder** in the **Custom Criteria** list.
2. On the **Criteria Builder** page:
  - a. Make a selection in the **Field** list.
  - b. In the **Relationship** list, select a relationship expression.
  - c. For **Value**, type the value that you want to select for that field.

For example, if you want to limit the report to employees whose Job Title is Production Manager, select **Job Title** for **Field**, select **Equal To** for **Relationship**, and type **Production Managers** for **Value**.

3. If you need to define another criteria:
  - a. Click the **And** button. The first part of the expression appears in the window.
  - b. Repeat step 2.

For example, if you want to also limit the report to Production Managers who started their job on or after 01/01/17, select **Job Start Date** for **Field**, select **Greater Than or Equal To** for **Relationship**, and type **01/01/17** for **Value**.

**Note:** If you want to delete all the criteria you defined and start over, click **Reset**. If you want to delete one criteria at a time (from the last to the first), click **Undo**.

4. When you finish defining the expression, click the **Done** button.

The page now shows the complete expression.
5. To save the expression to your Criteria Table:
  - a. Click the **Save To Criteria Table** button.
  - b. In the **Criteria Table** window, type a description for your new expression.

c. Click **OK**.

6. To save and select the expression, click **OK**.

The expression displays for **Custom Criteria** on the **Standard Criteria** tab.

## Using the Visual FoxPro Expression Builder

You can access the Visual FoxPro **Expression Builder** any time you need to create an expression for your custom criteria.

1. On the **Standard Criteria** tab, select **Visual FoxPro Expression Builder** in the **Custom Criteria** list.
2. In the **Expression Builder** window, build your expression. For detailed instructions for using the **Expression Builder**, see Using the **Expression Builder**.
3. When you finish defining the expression, click **OK**.

Your expression is then available from the **Custom Criteria** list on the **Standard Criteria** tab when you generate reports within the selected report category.

**Tip:** If you only need to use fields from the Employee Personnel database (HRPERSNL) in your expression, consider using the **Criteria Builder** instead. However, if you need to build an expression with fields from any database other than HRPERSNL, you must use the Visual FoxPro **Expression Builder**.

## Printing, previewing, or exporting a report

After you specify the standard and specific selection criteria in the **Report** window, generate your report by choosing:

- **Preview** to view it on the monitor
- **Print** to send it to your printer
- **Export** to export it to a file on the server

When you preview or print a report, the title of the report appears at the top of each page of the report. The date and time the report was generated appear at the bottom of each page, along with a sequential page number. Report totals and other control numbers also appear at the end of most reports.

Reports are formatted for standard 8.5-by-11-inch paper with a half-inch margin on all sides.

## Previewing a report

When you click **Preview**, a preview window opens on your monitor and displays the report. The top of the preview window contains the page preview toolbar, which enables you to enlarge your view, scroll through the report, and print the report. You can see each toolbar button name when you hover the cursor over the button.



The following table describes the buttons on the page preview toolbar.

Button	Action
	Click the <b>First Page</b> button to display the first page of the report. This button is disabled if you are previewing the first page of the report.
	Click the <b>Previous Page</b> button to display the previous page of the report. This button is disabled if you are previewing the first page of the report.
	Click the <b>Go To Page</b> button to select a specific report page to display. Enter the page number in the <b>Go To Page</b> window and click <b>OK</b> .
	Click the <b>Next Page</b> button to display the next page of the report. This button is disabled if you are previewing the last page of the report.
	Click the <b>Last Page</b> button to display the last page of the report. This button is disabled if you are previewing the last page of the report.
	Use the Zoom control to choose six different magnifications.  <b>Tip:</b> You can also click your cursor anywhere in the preview window to zoom in or out on a particular area of the report. When you zoom, your cursor changes to a magnifying glass.
	Click the <b>Close Preview</b> button to close the preview window and return to the <b>Report</b> window.  <b>Tip:</b> You can also click <b>×</b> in the report title bar to close the preview window.
	Click the <b>Print Report</b> button to print the report.

## Printing a report

When you click **Print** in the **Report** window, the **Print** window opens. You then select the printer and options such as a page range and number of copies.

If you have a PDF driver installed, you can create a PDF version of the report and then send it as an email attachment.

## Exporting a report to a file

You can export or save your report to a file so you can use it in a variety of different applications, such as Microsoft Excel, or submit it electronically. To export the report to a file:

1. Click **Export**.
2. On the **File Export Options** page for **File Type**, select the file format to use from the list. Certain reports, such as a Veterans Employment report, defaults to the **Electronic Submission** format.
3. For **File Name**, type one to eight characters for the file name. (The file extension automatically fills in based on the **File Type** you selected.)
4. Click **Export**.
5. An information window appears showing the location of the exported file. Click **OK**.

Sage HRMS exports the file to the `..\Sage\SageHRMSServer\Data\Export` directory on the server.

# Chapter 8: Custom reporting with SAP Crystal Reports

SAP Crystal Reports is a desktop query and reporting application that offers powerful data analysis capabilities. You can use SAP Crystal Reports to create your own unique customized reports or use templates created by other Sage HRMS users and specialists. You can produce a variety of presentation-quality reports with a minimum amount of effort. To create your own custom reports, see the SAP Crystal Reports online Help for detailed instructions.

You can add new report groups containing any custom reports created in SAP Crystal Reports to the **Reports Menu** and order the items in these groups to suit your specific needs.

Sage HRMS is shipped with dozens of custom reports that were created with SAP Crystal Reports. Custom reports are grouped into the following categories:

- "Custom HR reports" (page 55)
- "Custom Time Off reports" (page 62)
- "Custom Training reports" (page 63)

These custom reports can be used as they are or you can utilize SAP Crystal ReportsDesigner to modify them to suit your employer's needs.

**Note:** Sage HRMS Payroll database tables and fields are available in **Data Dictionary** Reports and using the Abra Data Access Driver. Contact Sage Professional Services or a certified channel partner for help creating custom reports specific for payroll.

## Creating a custom report

To walk you through the basic steps involved in creating a custom report using SAP Crystal Reports, we will use an example. When you want to create more complex reports, see the SAP Crystal Reports online Help for detailed instructions.

**Note:** We recommend creating a sub-report for each multi-record database you add to the same report.

The example report you will create will be an Employee Original Hire Date List report that retrieves the following information: employee first name, employee last name, and original hire date.



If you are creating a custom report for the first time, you must specify Abra HRMS Data Access as the data source. See the in-product Help for detailed information about Abra HRMS Data Access.

### To create a custom report

1. Select **Connected Services > Sage HRMS Tools > Crystal Reports** to launch SAP Crystal Reports.
2. In the **Welcome to Crystal Reports** window, select **Blank Report** and click **OK**.
3. In the **Database Expert** window:
  - a. Click the plus sign to expand **Favorites**.
  - b. Click the plus sign to expand **Abra HRMS Data Access**.
  - c. Scroll through the list until you find the tables you want to include in the report and click once to highlight the tables.  
For this example, highlight **HRPERSNL**.
  - d. Click **Add** to add a check mark to the tables you selected for the report.
4. When you finish selecting the tables you need for the report, click **Close**.

The report opens in Design mode with the **Field Explorer** window visible.

### To add a report title

1. In the SAP Crystal Reports main menu, select **Insert > Text Object**.
2. The text object appears as a floating object. Drag it to the location on the report and click once to anchor it in place.  
For this example, drag it to the upper right hand corner of the **Page Header** band line.
3. Double-click in the text object and type the report name.  
For this example, type `Employee Original Hire Date List`.
4. Drag your cursor over the title to highlight the text.
5. In the main menu, select **Format > Font**.
6. In the **Text Format** window for **Size**, select **14** and click **OK**.
7. If you need to expand the text object to accommodate the larger text:
  - a. Move your cursor anywhere inside the text object and click once to highlight the text box and display the crosshairs cursor.
  - b. Move the cursor to the right border of the text object until it changes to a left/right arrow.
  - c. Click and drag the cursor to resize the text object.

## To add column headings

1. In the SAP Crystal Reports main menu, select **Insert > Text Object**.
2. The text object appears as a floating object. Drag it to the location on the report and click once to anchor it in place.  
For this example, drag it to the lower left most position of the **Page** Header band line for the first column.
3. Double-click in the text object and type the report text.  
For this example, type `Employee Name`.
4. Drag your cursor over the title to highlight the text.
5. In the main menu, select **Format > Font**.
6. In the **Text Format** window for **Style**, select **Bold** and click **OK**.
7. Repeat steps 1 through 6 to create additional column headings.  
For this example, create a column heading for Original Hire Date, placing the column heading in center of the **Page** Header.

## To add the data

1. In the SAP Crystal Reports main menu, select **Insert > Field Object**.
2. In the **Field Explorer** window:
  - a. Click the plus sign to expand **Database Fields** and **HRPERSNL**.
  - b. Left-click and drag a field to the desired location on the report.  
For this example, drag **p\_fname** to the left most position of the Details band line, which will insert the employee's first name on the report.
3. In the main menu, select **Format > Font**.
4. In the **Text Format** window for **Size**, select **8** and click **OK**.
5. Repeat steps 1 through 4 to add the other fields.  
For this example, add the employee's last name using **p\_lname** and date of birth using **p\_orighire**.

## To format the report

1. Place your cursor over the separation line between the **Page** Header band line and the Details band line. The cursor changes to an up and down arrow.
2. Click once and drag the separation line down about 1/8 inch.
3. In the main menu, select **Insert > Line**. The cursor changes to a pencil.
4. Place the cursor on the **Page** Header band line under the **Employee Name** column heading.
5. Hold down the left mouse button and draw a line from the left side of the report to the right side of the report.

6. Right click on the line and select **Format Line**.
7. In the **Format Editor** window, change the width to the widest option and click **OK**.
8. Repeat steps 1 through 7 to add a line to the **Page Footer**.
9. In the main menu, select **File > Save As** and save the report.
10. In the main menu, select **File > Print Preview** to see the result.

### To add a table

If the report contains data from two or more database files, the database files must be linked. You use a field that is common to both databases to link the database files so records from one database match with related records from the other database.

For example, you can add benefit plans descriptions from the Employee **Benefit** table (**HBENE**) and employee benefit premiums from the **Benefit** Plan table (**HBEPLAN**) to the Employee report that uses the Employee Personnel table (**HRPERSNL**). You link the databases so that each employee can be matched up with their benefit descriptions (from the **Benefit** Plan table) and each benefit description (from the **Benefit** Plan table) can be matched up with the employee benefit premium (from the Employee **Benefit** table) .

1. In the SAP Crystal Reports main menu, select **Database > Add Database to Report**.
2. In the **Data Explorer** window, select the tables for the report:
  - a. Click the plus sign to expand **Favorites**.
  - b. Click the plus sign to expand **Abra HRMS Data Access**.
  - c. Scroll through the list until you find the tables you want to include in the report and click once on each table to highlight it.  
For this example, highlight **HBENE** and **HBEPLAN**.
  - d. Click **Add**, which adds a check mark to the tables you are adding to the report.
  - e. When you finish selecting the tables for the report, click **Close**.
3. The **Visual Linking Expert** window shows all the tables currently in your report including any existing links. To add a link:
  - a. Scroll through the primary database file, until you find the field to use as the link.  
For this example, the field is **p\_empno** in **HRPERSNL**.
  - b. Left-click and drag the field from the primary database file to the corresponding field in the related database file. After the database files are linked, a link line is created from the field in the primary database to the corresponding field in the related database.  
For this example, drag **p\_empno** in **HRPERSNL** to **b\_empno** in **HBENE**.
  - c. Repeat steps 3a and 3b for all fields to be used to link the databases.

For this example, drag **b\_benecode** in **HBENE** to **code** in **HBEPLAN**.

d. When done, click **OK**.


4. Add the fields that you want from the linked tables:

- a. In the main menu, select **Insert > Field Object**.
- b. In the **Field Explorer** window, click the plus sign to expand **Database Fields** and **HBEPLAN**.
- c. Left-click and drag **desc** (the benefit plan descriptions) to the desired location on the report.
- d. Repeat steps 4b and 4c to drag **b\_epremium** in **HBENE** (the employees' benefit premiums) to the desired location on the report.

## Custom HR reports

Sage HRMS provides the following custom HR reports that were created using SAP Crystal Reports.

Report name	Description
Age Listing	Lists employees sorted by age. The report includes employee age, birth date, employee name, job title, and organization levels.
<b>Benefit</b> Letter	Displays an employee's annual costs and contributions for both savings and insurance benefits. The report, in letter format, is designed to be printed on company letterhead and given to the employee.
Benefits Enrollment	Displays insurance benefits totals by employee. The report includes the employee monthly premium, employee monthly contribution, and the dependent monthly premium, along with the effective date of the plan.
Birthday List	Lists birthdays by birth month. The report includes the employee birth date, employee name, and employee address.
Blank HR	This report is designed to be used as a template for creating HR reports. It is linked to the employee master file and has the proper headers and footers.
Blood Donor List	Lists each employee's department and division, blood type, RH factor, last donation date, and the employee's telephone extension.
Census Report	Displays information an insurance company may require when calculating the cost of providing insurance. The report includes detailed information for each employee including birth date, social security number, gender, employee type, occupation, annual salary, date of hire, marital status, and number of insured dependents.

Report name	Description
<p>Certificate of Coverage</p>	<p>Provides proof of previous health insurance coverage for the employee, including the date the coverage began and ended as well as any covered dependents.</p> <p>You specify the <b>Date of Certificate</b>, <b>Administrator Name</b>, and <b>Group Health Plan</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p> <p><b>Before running this report, you must define the health plans to appear for Group Health Plan:</b></p> <ol style="list-style-type: none"> <li>1. In the SAP Crystal Reports main menu, select <b>Insert &gt; Field Object</b>.</li> <li>2. In the <b>Field Explorer</b> window: <ol style="list-style-type: none"> <li>a. Click the plus sign to expand <b>Parameter Fields</b>.</li> <li>b. Click once to highlight <b>Group_Health_Plan</b>.</li> <li>c. Click  (the Edit button) in the toolbar.</li> </ol> </li> <li>3. In the <b>Edit Parameter Field</b> window, click the <b>Set default values</b> button.</li> <li>4. In the <b>Set Default Values</b> window: <ol style="list-style-type: none"> <li>a. Select <b>hbeplan</b> from the <b>Browse table</b> drop-down list.</li> <li>b. Select <b>code</b> from the <b>Browse field</b> drop-down list.</li> <li>c. In the <b>Select or enter value</b> list (which shows all available group health plans), click once to highlight the plan you want to appear in the <b>Group Health Plan</b> parameter field.</li> <li>d. Click the <b>&gt;</b> button to add the selected plan to the <b>Default Values</b> list. (To remove a plan from the <b>Default Values</b> list, highlight it and click the <b>&lt;</b> button.)</li> <li>e. If needed, use the <b>Order</b> arrow buttons to move a plan up or down in the <b>Default Values</b> list.</li> <li>f. Repeat steps 4c-4e to add any additional plans to the <b>Default Values</b> list.</li> <li>g. When you have finished, click <b>OK</b>.</li> </ol> </li> <li>5. In the <b>Edit Parameter Field</b> window, click <b>OK</b>.</li> <li>6. From the menu, select <b>File &gt; Print Preview</b>.</li> <li>7. In the <b>Enter Parameters Values</b> window for <b>Group Health Plan</b>, select the plans to use when running your report.</li> </ol>

Report name	Description
<b>Code Table Reports</b>	Lists the codes defined in your code tables, such as job codes, event codes, and reason codes.
<b>Dependent List</b>	Lists employees, their dependents, including the dependent relationship, birth date, and social security number.
<b>Dependent Update List</b>	Lists employees and their dependents, including the dependent relationship, birth date, and social security number. Use the update information section to document changes to dependent information.
Drug Screen Listing	Lists the employee's name, date of the most recent drug test, its result, the number of years since the last test, and the date of the next test.
Emergency List	Lists employees and their emergency contacts.
Employee Address List	Displays employee demographic information, such as employee addresses and phone numbers.
Employee Benefits Summary	Lists employee insurance and savings benefits, including the associated costs. The report includes all plans that do not have an expiration date or have not expired (the expiration date is greater than the system date).
Employee Benefits With Dependents	Lists employee insurance and savings benefits, including dependent benefit information. The report includes all plans that do not have an expiration date or have not expired (the expiration date is greater than the system date).
Employee Count	Displays a count of all active and terminated employees.
Employee ID List	Displays the employee name and ID, job title, division, and department for each active employee.
Employee List	Displays active employees, including the employee name and ID, job title, original hire date, and annual salary. The report is sorted in ascending order by employee number.
Employee List by Name	Lists active employees sorted by employee name. The report includes the employee name, employee number, job title, division, and department for each active employee.
Employee Monthly New Hire List	Lists new employees grouped by division and department. The report includes the employee status, original hire date, and termination date. You specify the <b>Start Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b> ).

Report name	Description
Employee Phone List	Provides a telephone directory for your employees. The report includes the employee name and ID, work telephone number, extension number, and organization levels.
Employee Profile	Displays detailed information for each employee, including demographic, dependent, HR, and current job data.
Employees With No Benefits	Lists employees who do not have any insurance benefits.
Event Report	Lists employee events, such as training, licenses, bonuses, professional memberships, company cars, or anything defined in the Events code table. The report includes the employee name, title, organization levels, event code, effective date, event description, next due date, and comments associated with each event.
Head Count By Division	Displays employees by division in a graphical layout.
Insurance <b>Benefit Premium</b> Summary	Lists employee insurance benefits and the associated costs. The report includes all insurance plans that do not have an expiration date or have not expired (the expiration date is greater than the system date).
Insurance <b>Benefit Premium</b> Totals by Plan	Displays the total premium for each plan as well as the number of employees enrolled in the plan. The report includes all insurance plans that do not have an expiration date or have not expired (the expiration date is greater than the system date).
Job <b>Code</b> Table With Salary Grades	Lists the defined job codes and the associated salary grades.
Mail Labels	Provides employees' names and addresses printed in a two-column label format. You can adjust the information to print on the desired label stock.
Merit As Of	Displays employees' merits received as of a certain date. The report includes the employee name, effective date, reason for the merit, and salary. You specify the merit <b>As Of Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b> ).

Report name	Description
New Hire Log	<p>Displays the new hires for a specific date range. The report includes the employee's effective date, employee name, title, employee status, pay rate, hours normally worked per pay period, and annual salary. The report provides the total of the new hire salaries, the average of the salaries, and the new hire count.</p> <p>You specify the <b>Beginning Hire Date</b> and <b>Ending Hire Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
New Hire Reporting Form	<p>Displays the standard information most states require for new hire reporting, include Employer FEIN, Employer Name, Employer Address, Employer Contact, Employer Contact Phone, Employee Name, Employee Address, Employee SSN, Employee DOB, Employee Hire Date, and New Hire Date Range.</p> <p>You can modify this report to comply with your state's requirements. Contact your state for details about submitting the New Hire Reporting Form.</p> <p>You specify the <b>Beginning Hire Date</b> and <b>Ending Hire Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
OSHA 300 Illness Detail	<p>Displays information about employee illness cases as required by <b>OSHA 300</b> report standards. The report includes the case number, date, and employee ID. The report classifies totals by <b>OSHA</b> categories for Illness Types, Severity, and Number of Days.</p> <p>You specify the <b>Start Date</b>, <b>End Date</b>, and <b>Case Types</b> (including <b>Recordable</b>, <b>Nonrecordable</b>, or <b>All Cases</b>) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
OSHA 300 Illness Summary	<p>Displays a count of employee illness cases as required by <b>OSHA 300</b> report standards. The report classifies totals by <b>OSHA</b> categories for Illness Types, Severity, and Number of Days.</p> <p>You specify the <b>Start Date</b>, <b>End Date</b>, and <b>Case Types</b> (including <b>Recordable</b>, <b>Nonrecordable</b>, or <b>All Cases</b>) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
OSHA 300 Injury Detail	<p>Displays information about employee injury cases as required by <b>OSHA 300</b> report standards. The report classifies totals by <b>OSHA</b> categories for Severity and Number of Days.</p> <p>You specify the <b>Start Date</b>, <b>End Date</b>, and <b>Case Types</b> (including <b>Recordable</b>, <b>Nonrecordable</b>, or <b>All Cases</b>) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>



Report name	Description
<b>OSHA 300 Injury Summary</b>	<p>Displays a count of employee injury cases as required by <b>OSHA 300</b> report standards. The report classifies totals by <b>OSHA</b> categories for Severity and Number of Days.</p> <p>You specify the <b>Start Date</b>, <b>End Date</b>, and <b>Case Types</b> (including <b>Recordable</b>, <b>Nonrecordable</b>, or <b>All Cases</b>) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
<b>OSHA 300 Log Detail</b>	<p>Displays the number or work-related illnesses and injuries sustained by employees within a given time period.</p> <p>You specify the <b>Start Date</b>, <b>End Date</b>, and <b>Case Types</b> (including <b>Recordable</b>, <b>Nonrecordable</b>, or <b>All Cases</b>) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
Physical Exams Due	<p>Displays the date of the employee's last physical exam, the result of the exam, the date of the next physical, the number of years since the last physical, and the telephone extension.</p>
Promotion List	<p>Displays an employee's old job title, new job title, and the effective date of the new job.</p> <p>You specify the <b>Start Date</b> and <b>End Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b>).</p>
Salary <b>Analysis</b> by Division, Department and Location	<p>Lists employees' salaries by Division, Department, and Location. The report includes years of service, performance rating, and comparatio.</p>
Salary <b>Analysis</b> by Job <b>Code</b>	<p>Lists employees' salaries by Job <b>Code</b>. The report includes years of service, performance rating, and comparatio.</p>
Salary <b>Analysis</b> by Name	<p>Lists employees' salaries by employee name. The report includes years of service, performance rating, and comparatio.</p>
Salary Grade	<p>Lists each employee's salary and pay grade including the minimum, maximum and mid point of the salary grade.</p>
Salary History	<p>Displays an employee's salary history. The report includes pay rates, increase amounts, and percentages.</p>
Salary Review Form	<p>Displays salary information, including salary history and percent of increase. The report provides a form to submit job/salary changes.</p>

Report name	Description
Savings <b>Benefit Coverage</b> By Employee	Lists employee savings benefits, including the associated contribution amounts. The report includes all plans that do not have an expiration date or have not expired (the expiration date is greater than the system date).
<b>Scheduler</b>	Lists scheduled tasks, including the completion date and the person who scheduled the task.
Skills Listing	Lists each employee's skills, including years of experience in each skill and a comment area that provides short details about each skill.
Spouse List	Lists employees and their spouses.
Terminated Employee Name List	Lists terminated employees, including employee name and ID, termination date, and termination reason.
Transfer Log	Lists employees who transferred within a specified date range. You specify the <b>Start Date</b> and <b>End Date</b> in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b> ).
Turnover Statistics	Displays turnover statistics within a specified date range. The turnover statistics are calculated based on the <b>Service Length</b> . The report includes the termination type, date, terminated employee name and title, and service length. The report displays the turnover rate and summary statistics for each termination type. You specify the <b>Start Date</b> , <b>End Date</b> , and <b>Service Length</b> (including <b>Adjusted Seniority</b> , <b>Original Hire</b> , or <b>Last Hire</b> ) in the <b>Enter Parameters Values</b> window (accessed by selecting <b>File &gt; Print Preview</b> ).
Vets 100 Summary List	Lists the number of employees by job category for each Vets 100 category. The report includes newly hired veterans by category and total new hires for the specified 12 month period.
Vets 100 Detail List	Lists employee names and IDs by job category for each Vets 100 category. The report includes newly hired veterans by category and total new hires for the specified 12 month period.
Vets 100A Summary List	Lists the number employees by job category for each Vets 100A category. The report includes newly hired veterans by category and total new hires for the specified 12 month period. The report displays a summarized list of the required report data in the <b>Information on Employees</b> section of the VETS-100A form.

Report name	Description
Vets 100A Detail List	Lists employee names and IDs by job category for each Vets 100A category. The report includes newly hired veterans by category and total new hires for the specified 12 month period. The report displays a detailed list of the required report data in the <b>Information on Employees</b> section of the VETS-100A form.

## Custom Time Off reports

Sage HRMS provides the following custom Time Off reports that were created using SAP Crystal Reports.

Report name	Description
Absence Log	Lists the absence reason codes the employee has on record, along with the date, weekday, number of hours and comments regarding each absence. This report includes parameters for the Beginning Hire Date and Ending Hire Date.  <b>Note:</b> From the menu, select <b>File &gt; Print Preview</b> . In the <b>Enter Parameters Values</b> window, enter the values to use for the report.
Absenteeism by Reason	Displays absenteeism by absent reason in a graphical layout.
Attendance Summary	Displays a summary of attendance information for each plan, including carryover hours, hours accrued, year-end eligibility, and hours taken.
Attendance Totals by Plan	Displays attendance totals for each active employee for each plan. The report includes the employee name, employee number, the plan ID, carryover, hours accrued, hours taken, and hours available as of the current accrual date.
Attendance YTD Detail	Displays detailed attendance plan information for each employee, including hours accrued, carryover, hours taken, hours available, and as of date. The report also shows each absence date, day, hours absent, and the absence reason.
Attendance YTD Totals	Displays a summary of carryover hours, hours accrued, taken, and available as of the current accrual date.

## Custom Training reports

Sage HRMS provides the following custom Training reports that were created using SAP Crystal Reports.

Report name	Description
Courses Completed By Employee	Lists courses completed by an employee. The report includes the course description, instructor name, and length of the course in hours.
Expired Certifications	Lists employees with expired certifications. The report includes the employee name and ID, job title, date the certification was last received, and expiration date.
Job Training History	Lists courses completed by an employee during a specified period of time. The report includes the employee name, job title, department, course name and description, course completion date, and length of the course in hours.
Training Budget By Department	Displays the expenses associated with courses completed by an employee. The report is grouped by division and department. The report includes the employee name and ID, job title, course code and description, the date by which the course must be completed, and the cost of the course.
Training Exceptions By Department	Lists employees that need to take a specific course or specific courses. The report is grouped by division and department. The report includes the employee name and ID, job title, the course description and priority, and the date the training course is required.

# Chapter 9: Sage HRMS Secure Query

Secure Query is a query and reporting tool that enables you to request specific information from the database tables in Sage HRMS. For example, if you need information about your employees' demographics in a hurry to prepare for a meeting, Secure Query makes it easy to get the information you need.

When you use Secure Query, you can select which fields to output, sort results in ascending or descending order, build record filters, and group and summarize fields. When finished, you can choose to output the query as a report, spreadsheet, text file, or database table. You can also create and save the queries to be reused any time you need the information.

Secure Query reporting is available for the following features in Sage HRMS:

- Employees
- Time Off
- Training

## Ad Hoc Reporting Security

Use Ad Hoc Reporting **Security** to restrict the database files and fields available to a security group who uses Secure Query. Ad Hoc Reporting **Security** lets you assign an access level to each field contained in your Sage HRMS databases.

Setting a group's **Ad Hoc Reporting Security Level** works in conjunction with setting Ad Hoc Reporting **Security**. When you set up group security, (by selecting **Setup > System > Group Security** link), you establish an access level that determines which fields in the Sage HRMS system databases are able to be accessed by the security group's users whenever they use Sage HRMS Secure Query.

# Using Secure Query

Sage HRMS Secure Query makes it easy to create custom queries to help you analyze and interpret important information.

From the **Query** main page, you can:

- Select fields (page 70)
- **Group** records (page 71)
- Sort records (page 72)
- Set record filters (page 73)
- View data and run the query (page 77)

## Before you begin

Before you begin working with queries using live data, we recommend you review **Set Up Sample Queries** to guide you through the process of creating queries. Sample queries are provided in sample data for each installed product. You might want to see how a sample query works before you create your own. Switch from live data to sample data to practice with the sample queries before creating your own custom queries with live data.

**Note:** Queries created in sample data cannot be copied or imported from sample data to live data.

## Notes about Secure Query

- Only the author of a query or the Sage HRMS System Administrator can change the access type, edit the query, or delete the query.
- View the data retrieved by your query at any time by clicking either the **View Data** button or the **Run Query** button at the bottom of the page.

## Creating a new query

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. In the **Query List Manager** window, click **New**.
3. In the **Enter a Title for this New Query** window for **New Title**, enter a title for the query. This query title appears at the top of pages and prints on most reports.
4. Select an **Access Type** of either:
  - **Private** for personal use only
  - **Public** for all users who have access to Secure Query. Queries with a public access type can be viewed and copied for modification by all users who have access to Secure Query.
5. Click **OK**.
6. In the **Select Data To Use in Query** window on the **Choose Employee Information** tab, select the type of information to include in the query from the Master Table.

To define the fields in your query, you must know which Sage HRMS pages contain the fields you need. The pages you will always use contain fields from the Master Table. The Employee Master Table contains all the primary data for an employee in Sage HRMS HR, Time Off, or Training.

7. If you want all the fields from the Master Table available to choose from:
  - a. Click the **Advanced** button.
  - b. In the **Advanced Field Options** window, select **Make all Employee Master Table fields available for this query**.
  - c. Click **OK**.
8. In the **Select Data To Use in Query** window, if you want to select additional optional information from a second table:
  - a. Click the **Choose Additional Information** tab.
  - b. Select the appropriate type of additional information you want to include in the query.
  - c. Click **OK**.
  - d. In the **Select Fields to Show in Query** window, select the fields you want to include in the query from the **Fields to pick from** list. Either double-click the fields or press the **Shift** and **Ctrl** keys as you select the fields and click **Select**. The selected fields appear in the **Fields to include in query** list on the right in the order you selected them; this is the order that the fields will display in your query. (To remove a field from the **Fields to include in query** list, highlight it and click **Remove** or double-click it.)

**Note:** The available fields depend on the tables you selected in the **Select Data To Use in Query** window.

- e. If needed, change the order of the fields by moving your cursor over the button to the left of the field until you see a two-headed arrow. Then press your left mouse button and drag the field to the new position. When you release the mouse button, the field moves to the new position and the other fields automatically reorder to accommodate the moved field.
- f. After you select the appropriate fields, click **OK**. The **Query** main page opens.

From the **Query** main page, you can:

- Select fields (page 70)
- **Group** records (page 71)
- Sort records (page 72)
- Set record filters (page 73)
- View data and run the query (page 77)

To edit a query:

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. In the list of queries in the **Query List Manager** window, select the one you want to edit and click **Open**, which opens the **Query** main page so you can make your changes.

From the **Query** main page, you can:

- Select fields (page 70)
- **Group** records (page 71)
- Sort records (page 72)
- Set record filters (page 73)
- View data and run the query (page 77)



## To filter a query:

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. The first time you click the **Filter** button in a query, the **Set Record Filter** window opens. After you add your first condition to a record filter, the **Conditions List** page opens.

From the **Conditions List** page, you can:

- Add a new condition to a record filter (page 73)
- Edit a condition (page 74)
- Switch a connector (page 75)
- Move a condition (page 75)
- Bracket two or more conditions (page 76)
- Delete a condition (page 76)

## To copy a query:

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. In the list of queries in the **Query List Manager** window, select the one you want to copy and click **Copy**.
3. In the **Enter a Title for this Copied Query** window for **To New Title**, enter a new title for the query. This query title appears at the top of pages and prints on most reports.
4. Select an **Access Type** of either:
  - **Private** for personal use only
  - **Public** for all users who have access to Secure Query
5. Click **OK**.

## To rename a query:

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. In the list of queries in the **Query List Manager** window, select the one you want to rename and click **Rename**.
3. In the **Enter a New Title for this Query** window for **New Title**, enter the new title for the query. This query title appears at the top of pages and prints on most reports.
4. Select an **Access Type** of either:
  - **Private** for personal use only
  - **Public** for all users who have access to Secure Query
5. Click **OK**.

## To delete a query:

1. Select either **Reports > Employees > Secure Query** or **Reports > Training > Secure Query**.
2. In the list of queries in the **Query List Manager** window, select the one you want to delete and click **Delete**.
3. Click **Yes** to confirm the deletion. (Click **No** to cancel the deletion.)

## Selecting fields

Use the **Select Fields** tab to limit the results that are returned in your query to only those records that you are interested in. The **Select Fields** tab lists previously saved fields for the selected query.

1. On the **Select Fields** tab, click the **Select Fields** button.
2. In the **Select Fields to Show in Query** window, select the fields you want to include in the query from the **Fields to pick from** list. Either double-click the fields or press the **Shift** and **Ctrl** keys as you select the fields and click **Select**. The selected fields appear in the **Fields to include in query** list on the right in the order you selected them; this is the order that the fields will display in your query. (To remove a field from the **Fields to include in query** list, highlight it and click **Remove** or double-click it.)

**Note:** The available fields depend on the tables you selected in the **Select Data To Use in Query** window.

3. If needed, change the order of the fields by moving your cursor over the button to the left of the field until you see a two-headed arrow. Then press your left mouse button and drag the field to the new position. When you release the mouse button, the field moves to the new position and the other fields automatically reorder to accommodate the moved field.
4. After you select the appropriate fields, click **OK**.

The **Query** main page opens.

To include additional data:

1. On the **Select Fields** tab, click **Additional Data**.
2. In the **Select Data To Use in Query** window on the **Choose Employee Information** tab, select the type of information to include in the query from the Master Table.

To define the fields in your query, you must know which Sage HRMS pages contain the fields you need. The pages you will always use contain fields from the Master Table. The Employee Master Table contains all the primary data for an employee in Sage HRMS HR, Time Off, or Training.

3. If you want all the fields from the Master Table available to choose from:
  - a. Click the **Advanced** button.
  - b. In the **Advanced Field Options** window, select **Make all Employee Master Table fields available for this query**.
  - c. Click **OK**.

4. In the **Select Data To Use in Query** window, if you want to select additional optional information from a second table:
  - a. Click the **Choose Additional Information** tab.
  - b. Select the appropriate type of additional information you want to include in the query.

**Note:** You cannot remove a table from the query after you have selected it.
  - c. Click **OK**.

## Grouping records

Use the **Group Records** tab to specify how fields will be grouped and summarized in your query. Grouped data is data that is divided into meaningful groups. For example, a group might consist of all employees who have the same job title or are in the same department.

1. On the **Group Records** tab, select the fields you want the records grouped by from the drop-down lists. The values in the drop-down lists depend on the fields selected in the **Select Fields To Use in Query** window.
2. To add a count of the values within each group to the query, select **Count the number of records in the group**.
3. To display all the data, select **Detail records in the group**. However, to display a summary of the totals for each group, clear **Detail records in the group**. Summary information is most useful when you only want to examine totals and do not need the detailed information.
4. By default, numeric fields are displayed in the **Summarize the records for this numeric** field. From the list of fields, select the one you want to summarize and click once to highlight it.
5. Select one of the following summarizing options for the query:
  - **None**
  - **Sum the records in this field**—Adds the values within a group to provide a total.
  - **Average the records in this field**—Finds the average of all values within a group.
  - **Find the smallest value in this field**—Finds the minimum value within a group.
  - **Find the largest value in this field**—Finds the maximum value within a group.

## Sorting records

The **Sort Records** tab lists previously saved sorts for the selected query. If you have not selected a sort option for your query, only **Sorted by current record order** displays in the list, so the data is displayed in the same order as it appears in your tables.

Sorting means placing data in some kind of order to help you find and evaluate it. You define the field or fields you want the sort to be based on and the sort direction.

- In single field sorting, all the records used in the query are sorted based on the values in a single field. Sorting a query by employee last name is an example of a single field sort.
- In multiple field sorts, Secure Query first sorts the records based on the values in the first field. If two or more records have the same field value in the first sort field, those records are then sorted based on the value in the second sort field.

**Sort Direction** refers to the order in which the values are displayed when they are sorted.

- Ascending order means smallest to largest (1 to 9, A to Z).
- Descending order means largest to smallest (9 to 1, Z to A).

The fields you select for sorting automatically defaults to ascending order. "(DESC)" next to the field name indicates that the values in the field are sorted in descending order.

1. On the **Sort Records** tab, click the **Select Order** button.
2. In the **Select Sorting Order** window, select the fields you want to use for sorting in the query from the **Fields to pick from** list. Either double-click the fields or press the **Shift** and **Ctrl** keys as you select the fields and click **Select**. The selected fields appear in the **Fields to sort records by** list (and their corresponding sort order) on the right in the order you selected them; this is the order that the fields will be sorted by in your query. (To remove a field from the **Fields to sort records by** list, highlight it and click **Remove** or double-click it.)
3. If needed, change the order of the sort fields by moving your cursor over the button to the left of the field until you see a two-headed arrow. Then press your left mouse button and drag the field to the new position. When you release the mouse button, the field moves to the new position and the other fields automatically reorder to accommodate the moved field.
4. Click the **Sort Asc/Desc** button to change the sort order.
5. Click **OK**.

## Setting record filters

Use the **Set Record Filter** tab to limit the records included in a query. In some cases, you might want to specify a particular value to limit the results. For example, you can include only active employees.

You can create a query that enables you to specify a different value each time it runs. The record filter acts as placeholder for a value that is supplied when the query runs. For example, you can include only employees hired during a certain date range.

The **Set Record Filter** tab lists previously-saved conditions (a maximum of 10 conditions) for the selected query in the order in which you added them. If the record filter contains conditions with set values, the conditions display with their assigned values. If the record filter contains conditions that can have different values at different times, the condition appears with **{To be entered later}**. **Set Record Filter** fields do not have to be placed in a query in order to be used as a condition in a record filter.

Select the **Hide Duplicate Output Records** check box if you do not want the query to display records that are duplicated.

### To add a new condition to a record filter

1. On the **Set Record Filter** tab, select **Hide Duplicate Output Records** to prevent the query from including duplicate records from the database.
2. Click **Set Record Filter**.
3. Add a connector for the conditions:
  - a. In the **Set Record Filter** window, click **Add**.
  - b. In the **Select a Connector** window, select one of the following connectors:
    - **And** to require both this condition and the prior condition to be met. This enables you to specify that the values in a record filter must meet two (or more) conditions for the data to be included in the query. This narrows the scope of the search and usually returns less data.
    - **Or** to require either this condition or the prior condition to be met. This enables you to specify several alternative values in a record filter. This expands the scope of the search and can return more data.
4. In the **Set Record Filter** window on the **Pick a Field** tab, select the field that contains the data you want to filter or specify.
5. Click **Next** to move to the next applicable tab.

6. If you have a true-false condition:
  - a. On the **Pick True or False** tab, select the type of operator that describes the operation or action you want.
  - b. Click **OK**.
7. If you do not have a true-false condition:
  - a. On the **Pick an Operator** tab, select the type of operator that describes the operation or action you want.

**Note:** The choices on this tab depends on the type of field selected on the **Pick a Field** tab and the type of operator selected on the **Pick an Operator** tab.

- b. If needed, click **Next**.
  - c. On the **Enter a Value** tab, enter or select the appropriate value for the condition.
  - d. If you want the filter to prompt you for the values when the query is run, select **Ask later**.
  - e. If you want the filter to compare data in this field with the content of another data field, select **Compare to Field**.
  - f. Click **OK**.
8. On the **Conditions List** page if you have finished setting up the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)

## To edit a condition in a record filter

1. On the **Set Record Filter** tab, click the **Set Record Filter** button. The **Conditions List** page opens and lists previously saved conditions.
2. From the list, select the condition you want to edit.
3. Click **Edit**.
4. In the **Set Record Filter** window on the **Pick an Operator** tab, select the type of operator that describes the operation or action you want to take place.
5. Click **Next** to move to the **Enter a Value** tab (if the system does not automatically move you to that tab).
6. On the **Enter a Value** tab:
  - a. Select the appropriate value.

**Note:** The choices on this tab depends on the type of field selected on the **Pick a Field** tab and the type of operator selected on the **Pick an Operator** tab.

- b. If you want the filter to prompt you for the values when the query is run, select **Ask later**.
  - c. If you want the filter to compare data in this field with the content of another data field, select **Compare to Field**.
  - d. Click **OK**.
7. On the **Conditions List** page if you have finished changing the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)

## To switch a connector in a record filter

If a **Record** Filter includes more than one condition, the conditions are linked with one of the following connectors:

- **And** to require both conditions and the prior condition to be met (narrows the search)
- **Or** to require either this condition or the prior condition to be met (broadens the search)

Use the **Switch** button to change the connector that links two conditions.

1. On the **Set Record Filter** tab, click the **Set Record Filter** button.
2. On the **Conditions List** page in the list of previously-saved conditions, click once to highlight the condition that you want to change.
3. Click **Switch**.
4. When you finish changing the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)

## To move a condition in a record filter

1. On the **Set Record Filter** tab, click the **Set Record Filter** button.
2. The **Conditions List** page lists previously-saved conditions in the order in which you added them. This is the order in which Sage HRMS evaluates the conditions in the record filter. From the list of conditions, click once to highlight the one you want to move.
3. Click **Move**. A check mark indicates the condition you selected.
4. Go to the location where you want to move this condition and double click.
5. The condition moves to the new location. The other conditions automatically reorder to accommodate the change.
6. If you have finished changing the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)



## To bracket two or more conditions in a record filter

Brackets around two or more conditions forces those conditions to be evaluated together. For example, you might want to find employees hired during a certain date range that also have an employee status of either A (active) or L (leave of absence).

1. On the **Set Record Filter** tab, click the **Set Record Filter** button.
2. The **Conditions List** page lists previously-saved conditions in the order in which you added them. From the list of conditions, click once to highlight the one you want to change.
3. Click **Bracket**.
4. If you want to add parentheses:
  - a. In the **Insert or Remove Parentheses** window, click **Insert**. A check mark indicates the condition you selected.
  - b. Select the condition that contains the matching ending parentheses and double click.
5. If you want to remove existing parentheses:
  - a. In the **Insert or Remove Parentheses** window, click **Remove**. A check mark indicates the condition you select.
  - b. Select the condition that contains the matching ending parentheses and double click.
6. If you have finished changing the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)

## To delete a condition in a record filter

1. On the **Set Record Filter** tab, click the **Set Record Filter** button.
2. The **Conditions List** page lists previously-saved conditions in the order in which you added them. From the list of conditions, click once to highlight the one you want to delete.
3. Click **Delete**.
4. If you have finished changing the record filter, click **Done**. (If the **Enter a Value** tab opens, click **Cancel**.)

## Viewing the data, running a query, and outputting the query results

You can view the data retrieved by your query at any time by clicking either of the following buttons at the bottom of the **Output Results** tab:

- **View Data** to view the data in a preview window on your monitor. The data is displayed in the same order as it appears in your tables, with no grouping or sorting.
- **Run Query** to run the query and output the results as specified on the **Output Results** tab .

Before running the query, use the **Output Results** tab to specify the output of your query:

- A query report that you can preview, print, or save as a PDF file.
- An exported query file as an **ASCII** text file, for use in Microsoft Office applications, or as a data table.

### Generating a query report

You can output the query as a report that you can view or print. Reports are formatted for standard 8 1/2-by-11-inch paper with a half-inch margin on all sides. Portrait orients the print vertically and displays a maximum of 6 columns. Landscape orients the print horizontally and displays a maximum of 8 columns. Each report has a query title that is at the top of each page of the report.

To generate a report:

1. On the **Output Results** tab, select either **Report (Portrait Layout)** or **Report (Landscape Layout)**.
2. Click **Run Query**.
3. In the **Report Setup** window, select the **Output Direction**.
4. To preview the report, select **Preview**. You can use the **Page** Preview toolbar (explained in the next section).
5. To print the report:
  - a. Select **Print**.
  - b. In the **Print Options** window, select the appropriate options (such as page range, number of copies, and name of printer).






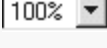


**Tip:** If you have a PDF driver installed, you can create a PDF version of the report and then send it as an email attachment.

6. Click **Start Report**.

7. If you send a report, it is generated as a PDF file attachment to an email message. You need to specify the recipient (who needs to have Adobe Reader to view the report). The email subject will be **Sage HRMS Report**.
8. Click **Yes** to view the file. If you do not have Adobe Reader installed, directions will be provided to where you can download it from the web and install it. If Outlook is not installed, the file will be placed in the export directory.

### Page Preview toolbar

While previewing a report, you can use the page preview toolbar to enlarge the view, scroll the pages, and print the report. The toolbar button name displays when you position your cursor over the button.

Button	Name	Description
	First Page	Displays the first page of the report. (This button is disabled if you are previewing the first page of the report.)
	Previous Page	Displays the previous page of the report. (This button is disabled if you are previewing the first page of the report.)
	Go To Page	Lets you select a specific report page to display.
	Next Page	Displays the next page of the report. (This button is disabled if you are previewing the last page of the report.)
	Last Page	Displays the last page of the report. (This button is disabled if you are previewing the last page of the report.)
	Zoom	Lets you choose six different magnifications. You can also click your cursor anywhere in the preview window to zoom in or out on a particular area of the report. When you zoom, your cursor changes to a magnifying glass.
	Close Preview	Closes the preview window and returns to the Reports window. You can also click <b>X</b> in the report title bar to close the preview window.
	Print Report	Prints the report.

## Exporting a query to a file

You can export or save your query to a file so you can use it in a variety of different applications, such as Microsoft Excel.

To export the query:

1. On the **Output Results** tab, select the **File Type**. The extension for **Filename** automatically fills in accordingly.
2. If you want, change the **Filename**, such as to add a date. The file name can have a maximum of 40 alpha and numeric characters (a-z, A-Z, and 0-9). Do not use any special characters (such as #, -, @, or punctuation marks).
3. Click **Run Query**.
4. When the process is complete, a message displays the total number of records exported to your file, the location of the file, and asks if you want to view file. Click **Yes** to view the file.

Sage HRMS exports the file to the **\EXPORT** directory in your Sage HRMS directory.